Edinburgh Napier UNIVERSITY

HR Connect

People Manager User Guide

VERSION HISTORY

Version	Date	Change Summary
1.0	October 2011	N/A

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INTRODUCTION

HR Connect - People Manager has been designed to ensure that all levels of manager have access to a wide range of information about their staff within an easy-to-use environment. The following functionality will be available for Line managers:

- View job, salary, training history for team members
- Approve annual leave requests
- View team annual leave calendar
- Approve training booking requests
- View sickness absence history
- View team sickness absence calendar
- Run a selection of standard reports

People Manager is a view of the main HR Connect application. It uses standard menus and pages to display the data. The only difference between People Manager and the main HR Connect application is the selection of and access to people and their data.

Users who have been given People Manager Access can manage authorisation requests for people who have been assigned to them.

Managers and Reportees

If you have line management responsibilities as part of your role you will be identified as a People Manager. The people visible to you in People manager are identified by using position to position reporting lines. A reporting line can, if appropriate, cut across the organisation structure.

These relationships have been validated with line managers and should be kept up to date on an ongoing basis, through your HR Client Partner. In systems terms, a line manager for a position would be the authoriser of holidays, learning events and will have a view of information for all their direct reportees.

The view enables reporting managers to see **all** their reports – even though they are not direct reports. So a Head of School will have access to information for everyone in their School, not just their immediate reports.

In your role as a line manager, you will have relevant restricted access, which will be actively audited by HR, through the People Manager function in order to carry out the full range of your line management responsibilities. This is mainly position based or contact information. You do not have access to sensitive information such as NI number or diversity data.

All data held on HR Connect continues to be made available to staff in Human Resources.

Multiple Roles

Where an employee has more than one role, they will be assigned to the line manager for each role that they occupy.

DATA PROTECTION & CONFIDENTIALITY

As People Manager contains detailed position information including salary scales it is important that you use it responsibly to ensure that the security of this information is maintained at all time.

Therefore, when you have finished using People Manager please always ensure that you logout:-

To logout you click the in the top right hand corner of the People Manager page or close your web browser or tab.

Your login details are the same as your university username and password. It is important that you never let anyone else know your University username and password as this information would allow people to access information about you and your staff through People Manager & Self Service, hence exposing a risk of identity fraud. If you believe others may be aware of your Password please change it.

If at any point you feel that your information security may have been compromised you should contact the University's IT Help Desk in the first instance (ext.3000). More details about Information security can be found here.

Following training, Line managers will be asked to confirm acceptance of the HR Connect Line Managers statement.

Line Managers should also make themselves aware of the Data Protection Fair processing statement for staff.

Download the Data Protection Fair Processing Statement for Staff

FUNCTION ACCESS and NAVIGATION SECURITY

Function access defines which parts of the system a user can access and what, if anything, they can do with that data. This includes navigation security that controls which parts of HR Connect a user may or may not have access to. It also includes field level security which can be used to hide certain fields or make them read only. This prevents a user from accessing or amending a part of the system that is denied to them. e.g. individual's records or other sensitive information.

An access restriction has been created that means that a user cannot view their own details in People Manager. This means that their details will not return in any of the standard reports that they run.

To ensure that sensitive personal information is not available in the person search results global field security settings have been created. This means that date of birth, gender, HESA number, NI number will not return in search results.

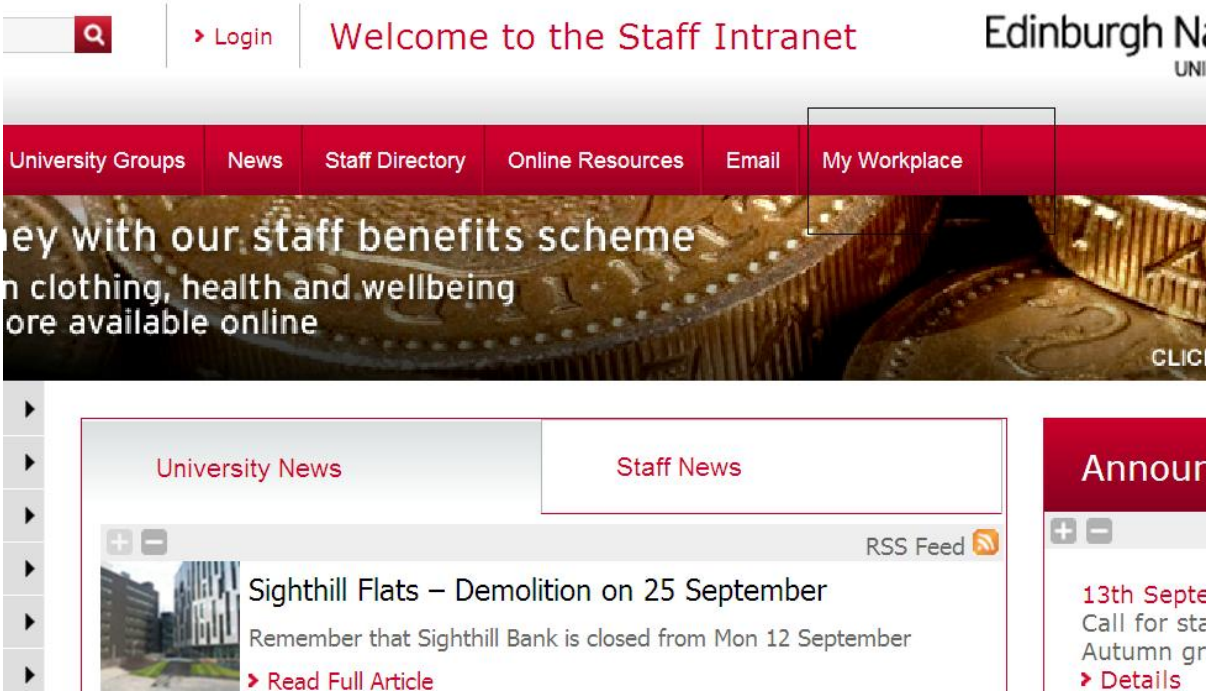
Over and above determining the fields/images that people managers will have access to, there is also a requirement to either hide or ensure fields/buttons so that records cannot be amended. In HR Connect, most screens are read only with the exception of screens used in the authorisation process or linked to holiday management.

You can only access current staff data. Historical information since 2001 has been loaded into the system where available i.e. position history, personal learning events.

LOGGING ONTO PEOPLE MANAGER

To connect to People Manager, go to the Edinburgh Napier Staff Intranet home page, click on **My Workplace** and select **HR Connect People Manager** from **Online Services**.

HR Connect is a web- based system and so can be accessed directly from any University networked PC. It can also be accessed externally to the University if VPN access has been set up. This provides secure system access to University systems.



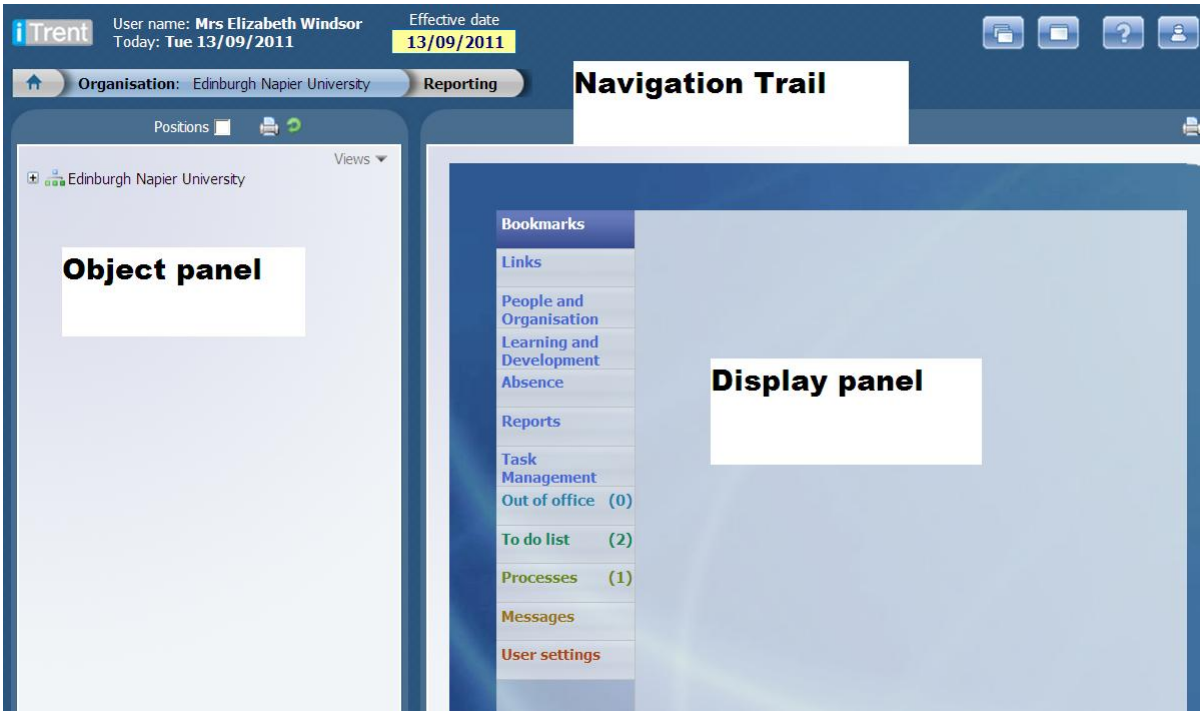
This will bring you to the Log In screen

Enter your University **User name and Password.** It is vital that you comply with the University's **Information Security Policy** and the Data Protection Fair Processing Statement for Staff.

Download the Data Protection Fair Processing Statement for Staff

NAVIGATION

Once you have logged on, you will see the following standard desktop navigation options.



Object Panel shows relevant records for the user, e.g. their line management reports. These records can be highlighted individually, globally or in any combination, in order to select a relevant form from within the Display panel, to view relevant information on team members.

In other parts of the system you will select what you want to look at in more detail e.g. a holiday absence.

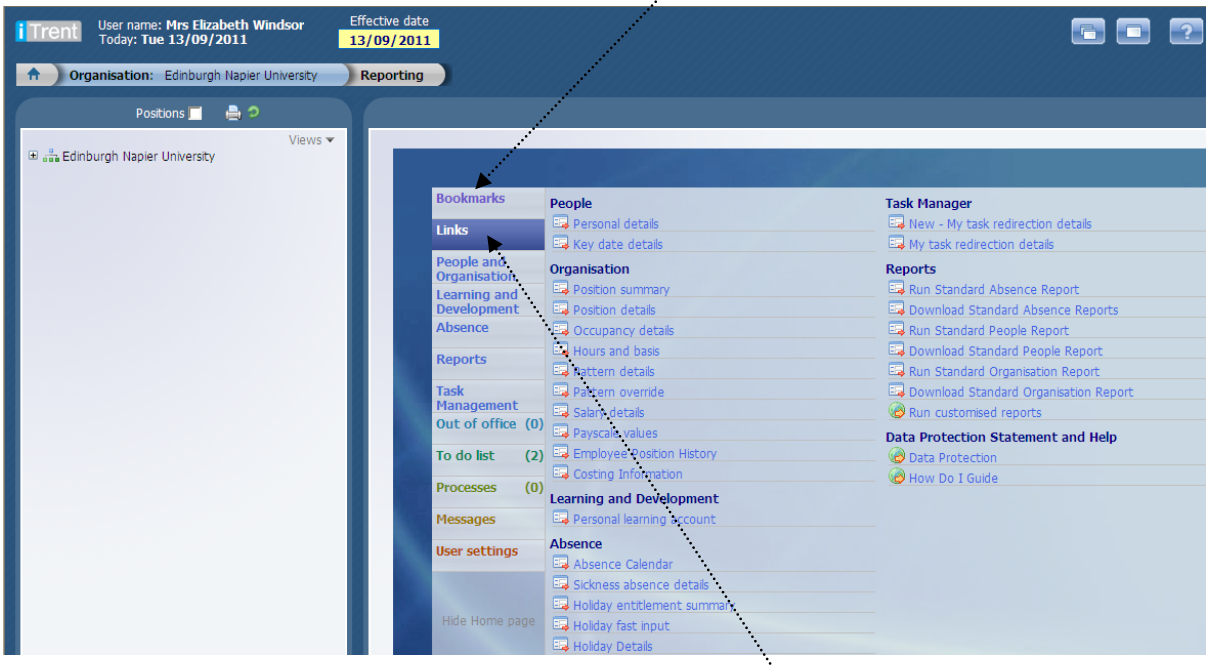
Display Panel provides access to all the folders, forms and processes available to the user.

Navigation Trail (“Breadcrumb Trail”) is displayed in all screens and shows where you are within People Manager. You can also click on any item within the trail to return to that point in the system.

HOME PAGE

The Home page displays a set of folders in the Object Panel and the details relating to a selected folder are shown on the Display Panel.

The default home page tab is set at To-do list but this can be changed by the user using User settings.



Folders are shown in dark blue (People and Organisation, Absence, Learning and Development etc) and the pages are shown under them in light blue.

The Folder that is currently selected is shown in dark blue (Links).

More details are provided within this guide, and can be accessed by clicking on the hyperlinks but in brief the options are:

Folder name	Details
Bookmarks	People Manager users won't need to use this area as all screens are accessible directly from the Links menu
Links	The Links folder provides a set of interactive 'single click' links to commonly used HR Connect pages. However, more links are available on each of the subsequent folders.
People and Organisation	Displays all available links to key people information
Learning & Development	Displays all available links to key learning and development information

Folder name	Details
Absences	Displays all available links to holidays, sickness absence and peer groups
Reports	Displays all available links to key reports
Task Management	Allows task redirection when you are out of the office e.g. authorising holiday
Out of Office	Lists team members who are identified in HR Connect as being out of the office (the default is today's date) e.g. have a recorded absence or are scheduled on a corporate training event
To Do List	Displays any outstanding tasks which require the user's attention including authorisation of holiday requests or learning event bookings.
Processes	Lists any background processes e.g. running a report, which have been completed in the last 24 hours.
Messages	Displays any current "System Alerts" or "Message of the Day" texts
User settings	Displays the default preference settings set at System Administrator level and allows the user to choose their preferred options when available.

OTHER NAVIGATION DETAILS

There are a number of other links and shortcuts available to you when using People Manager that it is useful to be aware of.

Effective Date

- By default whenever you search for information in People Manager you will be viewing the information that is as at today's date. However, if you change the date in the 'Effective Date' box at the top of the screen you will be able to view information relating to other days. To go back to information at today's date type "t" in the box and press enter. To go back to information at yesterdays date type "y" in the box and press enter.

People Search - This view can be used to search for an individual or a specific selection of employees; it therefore maybe a useful tool for quickly finding a reportee if you have many staff reporting to you.

Refresh ( ) - If you experience any problems or wish to refresh any People Manager screens for any other reason then you can do so by clicking the refresh icons above the left hand menu or the main section of People Manager. You should not refresh People Manager using your browser as this may cause your People Manager session to be closed

Print ( )- If you wish to print any of the information displayed in People Manager then you can click the print icon

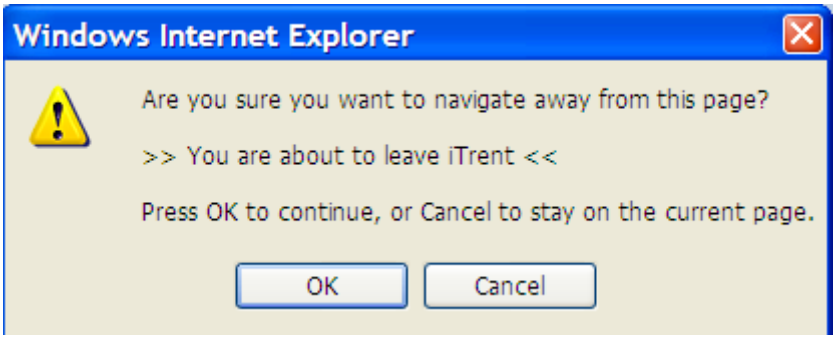
New View ( ) - If you click this icon then another People Manager tab will be opened. You can navigate between or close multiple tabs by clicking on their link in the bottom right hand corner of the screen

Full/Normal View ( ) - If you click this icon then the main section of People Manager will be extended across the entire page hence removing the left hand menu. This may help you to view some of the information that you have displayed. You can simply click on this icon again to get the left hand menu to reappear

Help - This link gives access to the HR Connect help menu, however this is the default Midland iTrent system guidance and my not relate exactly to the HR Connect settings, so may cause some confusion for users.

Employee Self Service - This link gives quick access to the users Employee Self Service screens.

Logout - The logout icon is only available to Internet Explorer users, but can be used to log out of People Manager. You will be asked to confirm your log out.

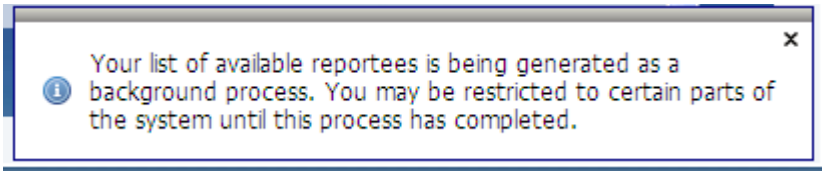

Windows Internet Explorer
Are you sure you want to navigate away from this page?
>> You are about to leave iTrent <<
Press OK to continue, or Cancel to stay on the current page.
OK
Cancel

If you can't see the logout icon then you can securely log out by simply closing the browser or tab that you are using to access People Manager

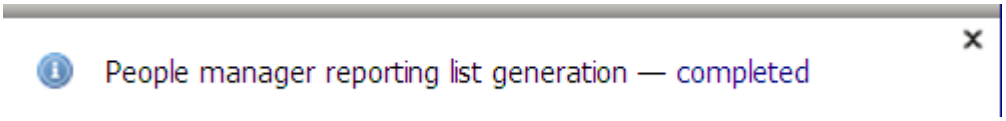
To navigate/return to the Home Page from any screen within People Manager, simply click on the Home Icon

TEAM STRUCTURES, ACCESS AND VIEWS

When you login to People Manager, your reporting hierarchy at that point, is used to set up a temporary structure security access profile, giving you access to **only** your **reportees** and their positions at today's date.


Your list of available reportees is being generated as a background process. You may be restricted to certain parts of the system until this process has completed.

This process can take 30 seconds to complete and once complete the reporting structure is displayed in the Object Panel (the left hand menu).



NB - Do not click on the structure icon until you receive a pop-up message (stating your People structure is completed) otherwise you will not be able to select an individual.

To view any People Manager information you must first select the reportee you want to view information on from the Object Panel.

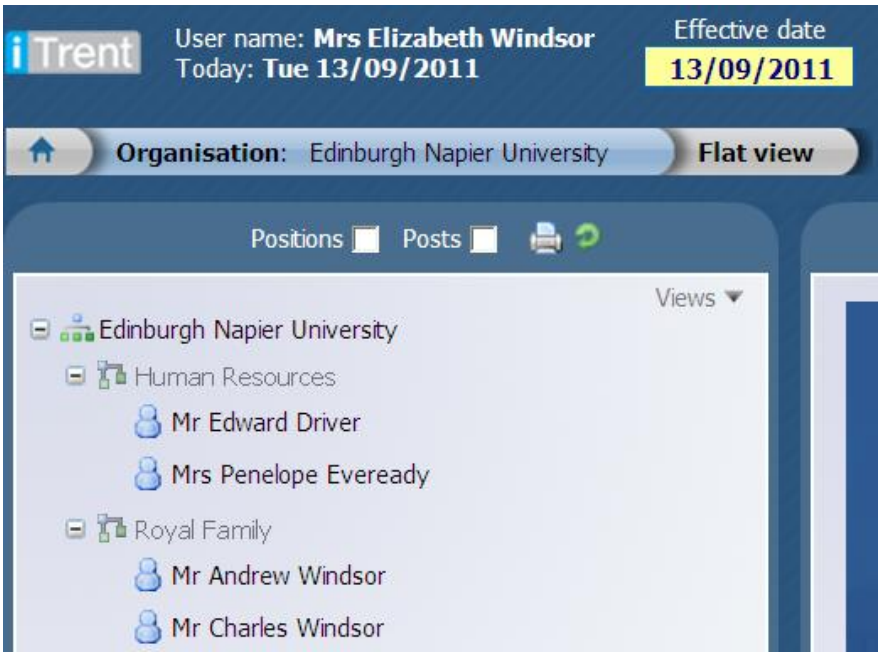
Once a reportee has been selected, you can then click on a Link from the Object Panel to view information about that reportee which will be displayed in the Display Panel.

You can control how you wish to view and select your reportees. After logging in People Manager will default to the Reporting View, but if you select the **'Views'** dropdown you are able to select how you see the data.

Reporting View - The Reporting view displays all of the manager's people and who they report to. Click on the **+ / -** to expand or contract the structure.

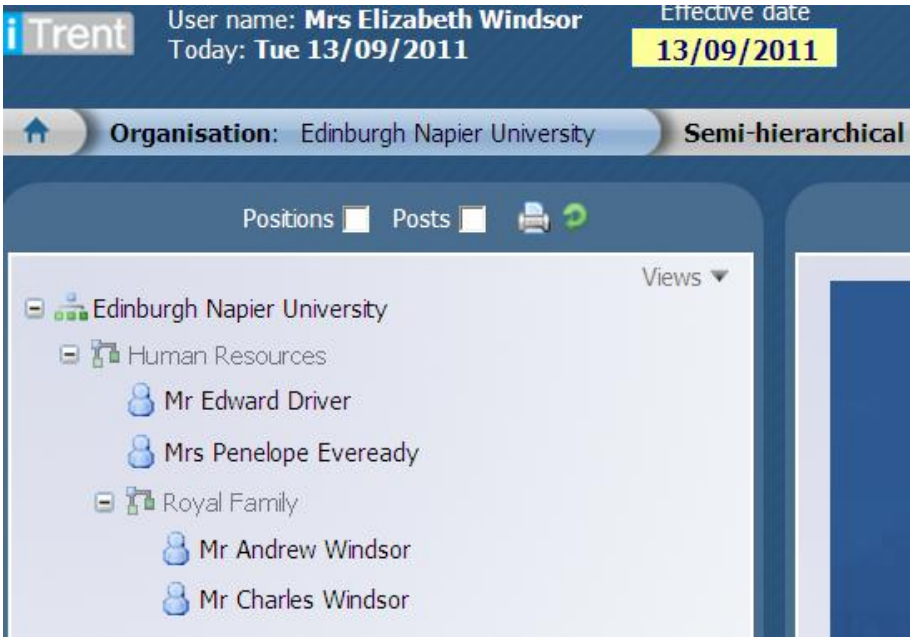
The names should be dark**.** If they are greyed out, press refresh

Flat View – The Flat view displays all the people who report to you grouped in their respective units. Each Unit is shown on the right and doesn't contain any information of which unit reports to which unit.



Hierarchical View - This view shows all the people in their units, but this time the units are embedded within each other so you can see which unit is in which department

Semi Hierarchical View - This view is very similar to the full hierarchical view and in many cases identical. The only difference is that the semi-hierarchical view does not display units that have no people who report to the manager in them



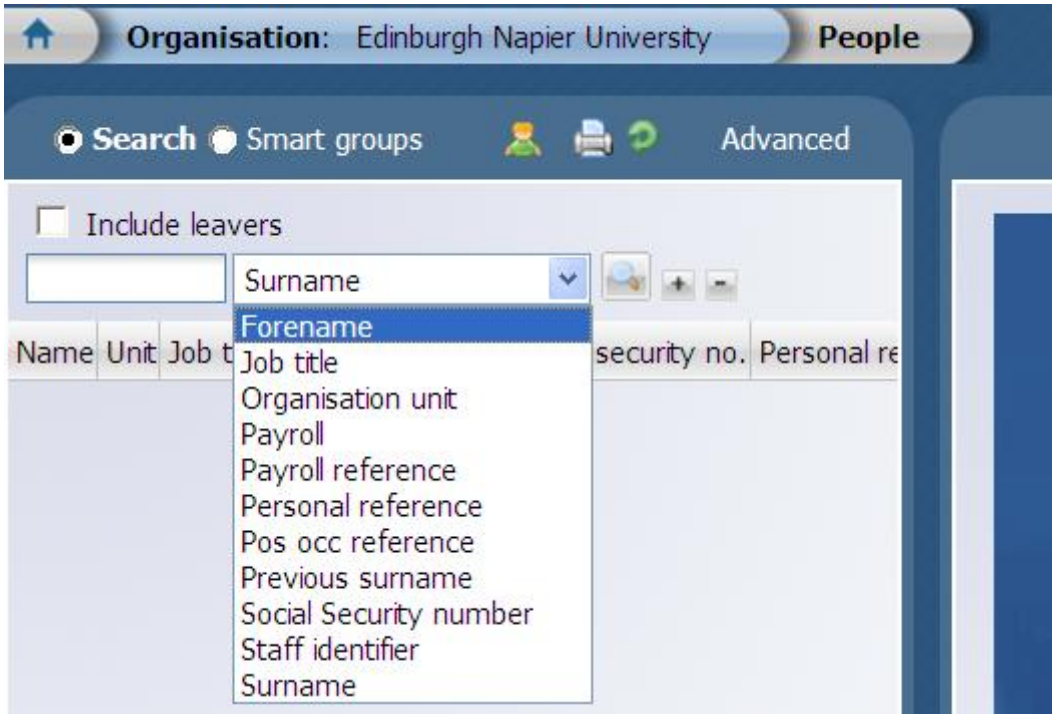
Position and Post Selection

You are also able to modify these views using the tick boxes that are displayed at the top of each object panel. For example:

Positions	Includes the positions for each displayed person. (When Reporting view has been selected, only Positions may be selected)
Post	Includes the post for each displayed person.

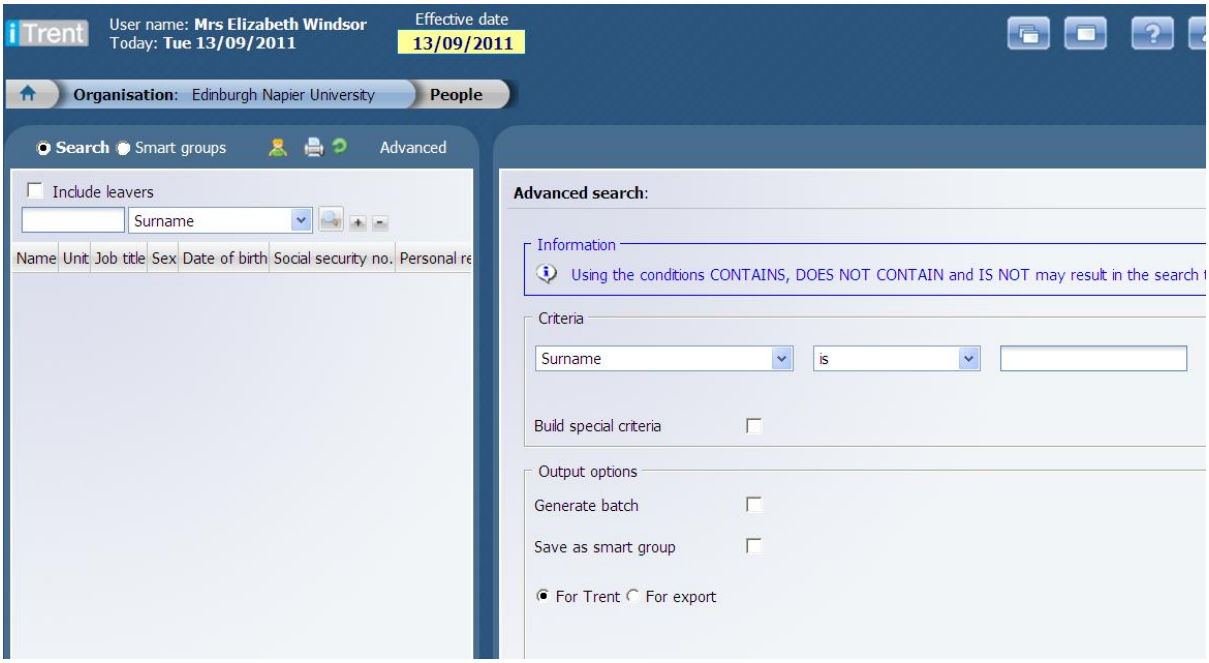
People Search

This view can be used to search for an individual or a specific selection of employees; it therefore may be a useful tool for quickly finding a reportee if you have many staff reporting to you.



When using people search you should be aware of the following:-

- You can return to the reporting view by clicking on the 'People' icon ( )
- As well as searching by 'Surname' you are also able to search your reportee's by forename, unit, job title or personal reference number by selecting this option from the dropdown menu before searching.
- To select more than one individual, press ctrl and click on names



- You can also select the 'advanced' option to make an even more detailed search of employees
- You should not select the smart groups radio button, as this is a functionality that is not applicable to People Manager
- Once People Search has been selected you will have to complete any action that you have initiated before you are able to return to the reporting view

Casual Staff

Casual staff will be displayed in your reporting hierarchy along with other staff.

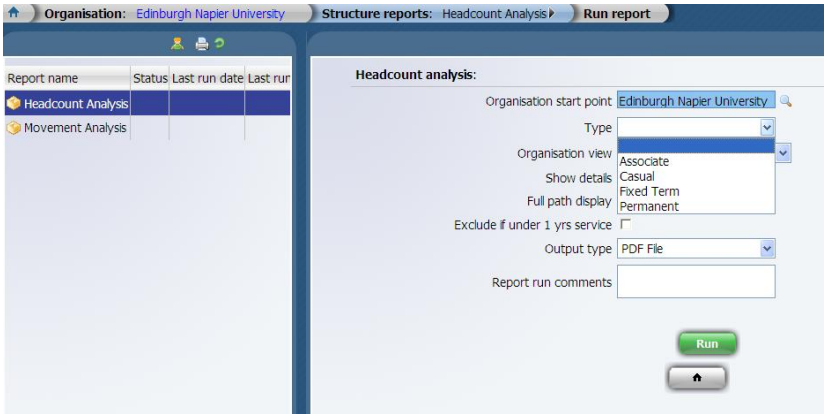
Select reportee you want to view information on from the Object Panel. Once a reportee has been selected, you can then click on **People and Organisation, hours and basis of employment.**

You will see casual under **Type**

All casual workers who have been paid in the last year should be displayed. Please note the following:

1) If the casual employee is unlikely to require payment from us in the current Academic year, please complete a Leaver Notification form and send to your HR Advisor. This will generate a P45 for them.
2) If you can see a casual employee, and they are not familiar to you please let your HR Advisor know.
3) If you cannot see a casual employee who you would expect to see, then please raise with your HR Advisor.

All people within the structure will appear within the reports available to you. In most of the standard reports you are can define the **Type** of person you want to include in the content.



Displaying Positions - Using the reporting view you may also be able to use People Manager to access data relating to vacant positions. If you tick the position tick box above your list of reportees their positions will be displayed, along with any vacant positions that would be reporting to you.

Beside each of these positions is a chair and these a colour coded like this:-

A blue chair ( ) represents a Position that is occupied by an employee

A green chair ( ) represents a Vacant Position, where the Staffing Authorisation process has been completed. It will also be green if an occupant has recently left and clarification is required on whether the position is to be ended. Where there has been a redundancy a position will be ended.

VIEWING INFORMATION - FOLDERS

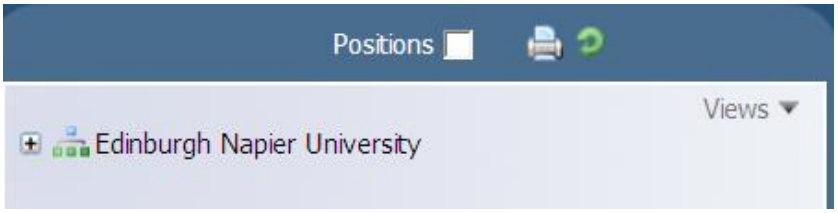
To view any People Manager information you must first select the reportee you want to view information on from the Object Panel, using the process above; once a reportee has been selected you can then click on a link from the homepage to view information about that reportee. Once you click on a link the information will be displayed in the Display Panel of the screen.

LINKS

The Links folder holds links to the most frequently used pages, although there may be other information available in the specific folders. The process detailed below can be used to select any of the key links.

PEOPLE

Personal Details - Using this method you can then select people by expanding the displayed view.

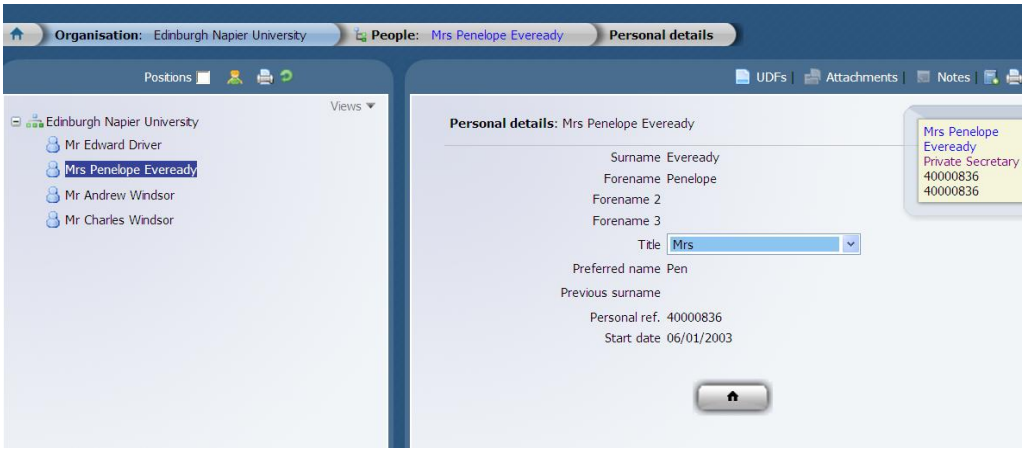


Click the **plus icon** to expand the view

Expand the view until you find the person

Click to highlight the individual

Click **Personal details** from the People folder of the Links section of the Home page. As you have already selected the person HR Connect will simply open the Personal details page for the selected person.



Alternatively

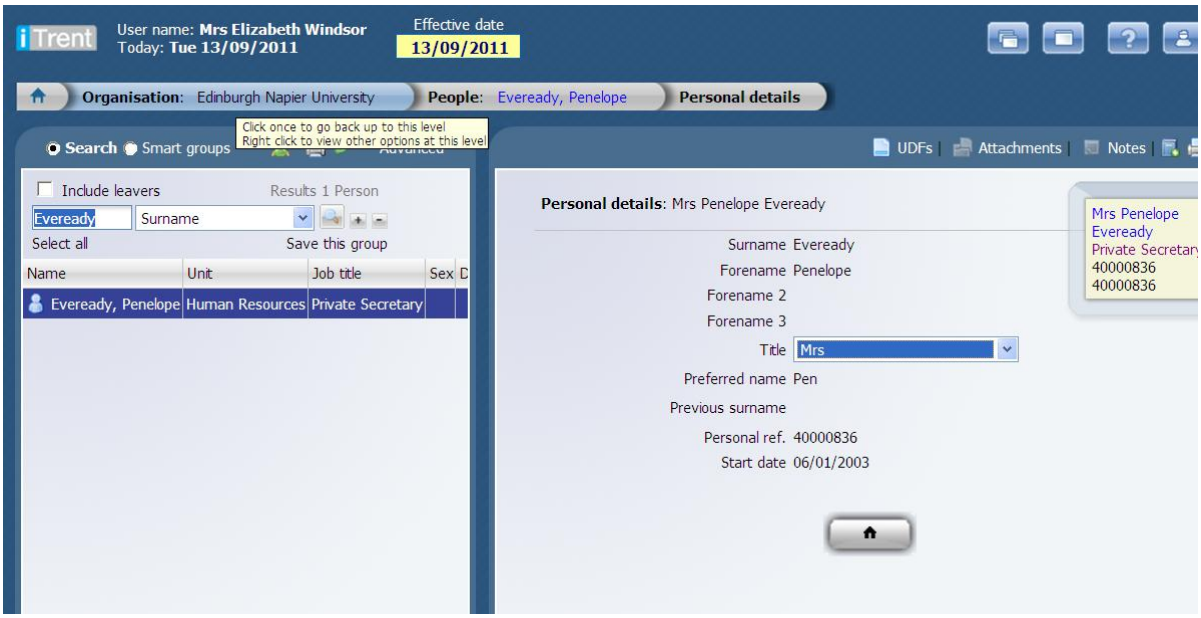
Click **Personal details** from the Links section first, this opens the People search panel and highlights the search field with a red box around it.

Enter the surname of the person you wish to see.

There is a search for the person and once found displays the results in the Object panel.

Select the required person from the list.

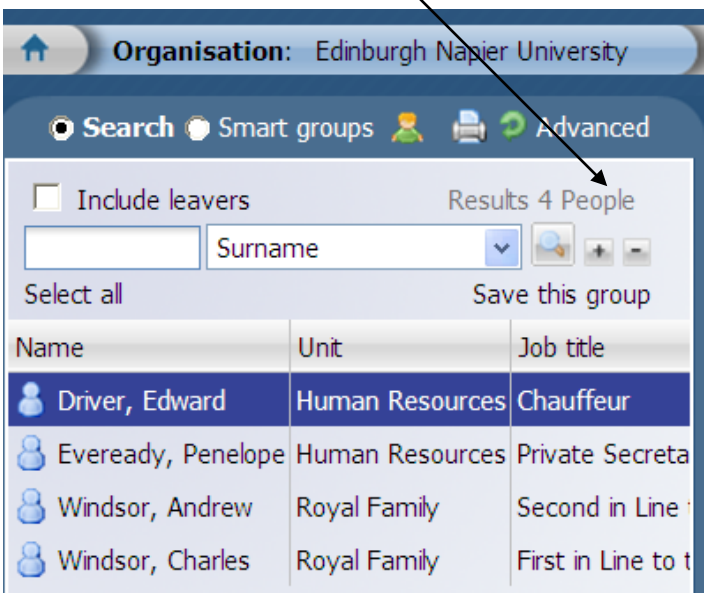
The Personal details are displayed for the selected person:



You can then use the displayed details page as required.

To return to the Home page you can click the Home page button

If you select the magnifying glass beside the drop down menu, then the search will list all your reportees:



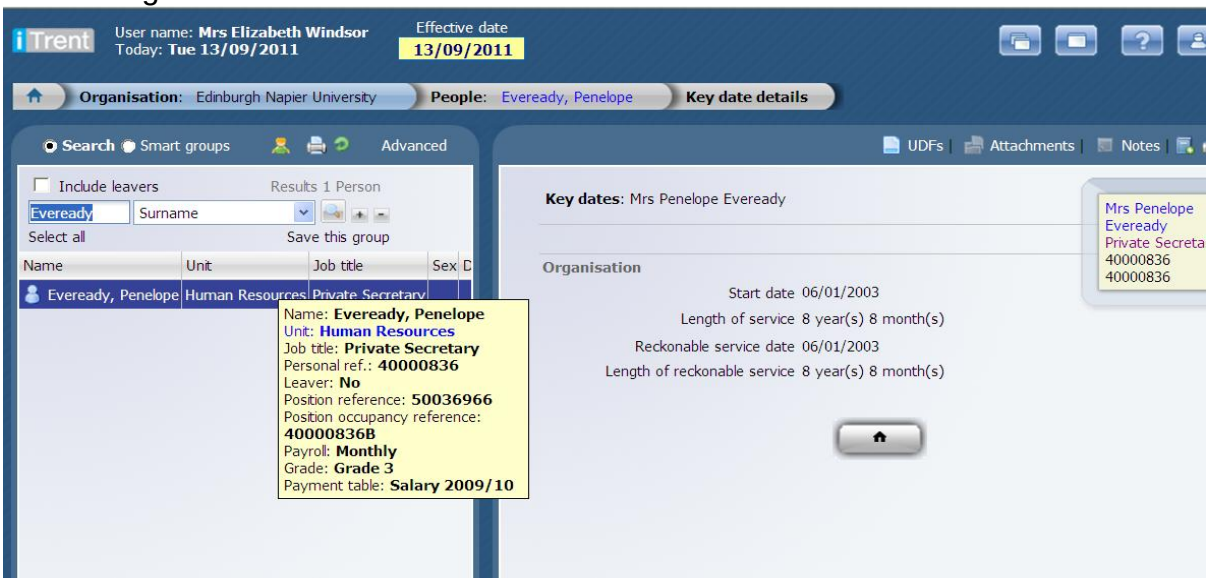
This option can be used for a single person but is probably more valuable for:

a) Searching and extracting a group of people.
b) Comparing data across a number of employees.

In either case you will, having selected the employee(s), access standard HR Connect pages to perform your requirements.

Key date details

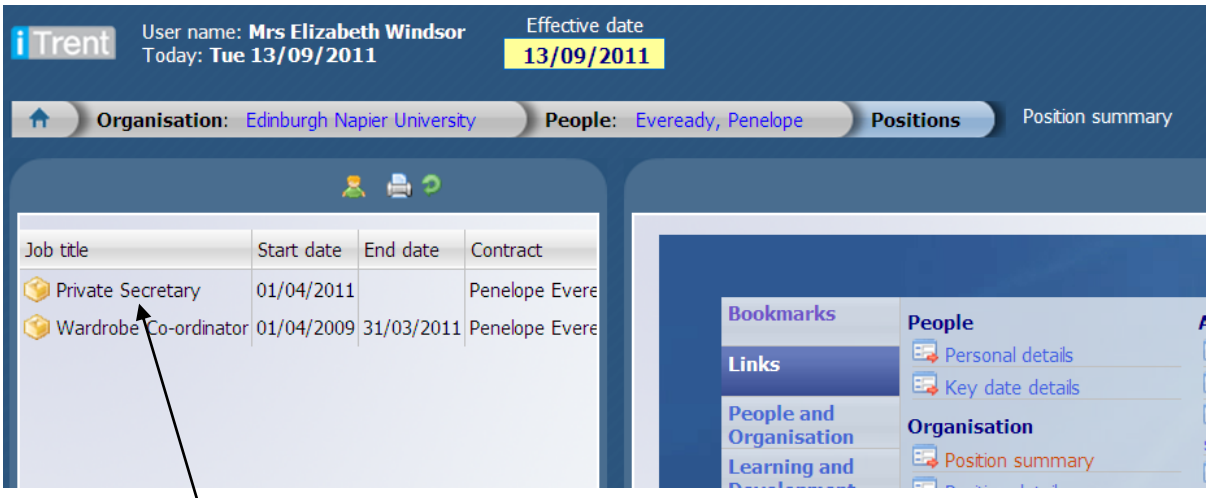
Select the employee
Click on **Key Date Details**
View available - Organisation start date / Length of Service / Reckonable Service date / Length of Reckonable Service



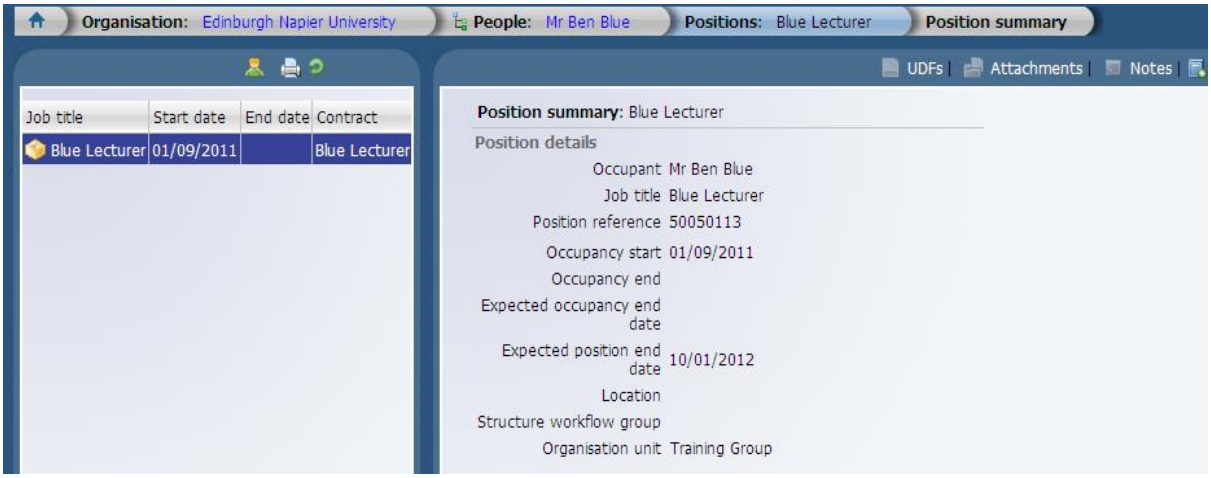
ORGANISATION

Position Summary

Select employee
Click on **Position Summary**



View Summary of Positions held in Object panel
Select the Position Required



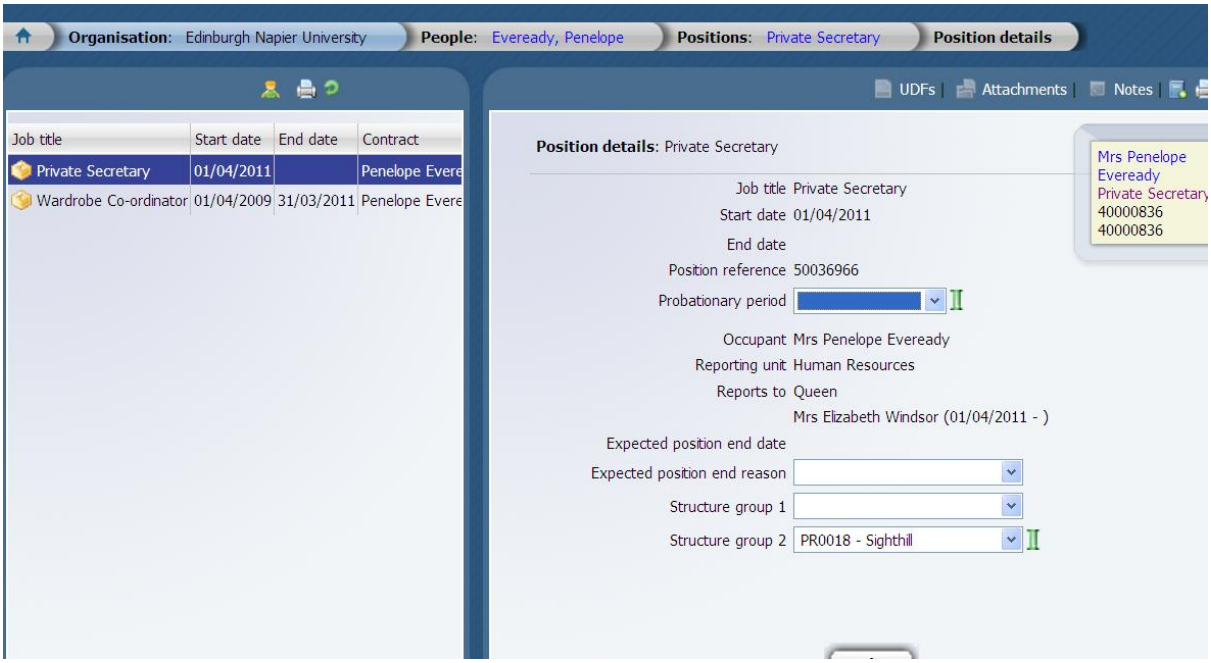
Position Summary appears in the Display panel

View available – Occupant / Job Title / Position Reference / Occupancy start / Occupancy End / Expected Occupancy end date / Expected position end date / Location / Structure workflow group / Organisation unit

Position details

Select employee
Click on **Position details**

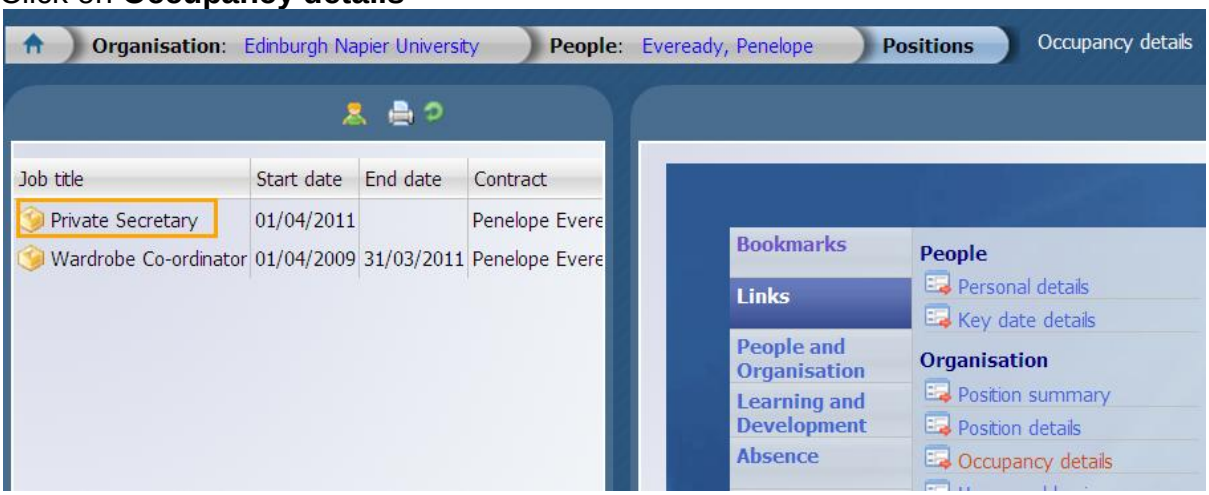
View Summary of Positions held in Object panel
Select position required



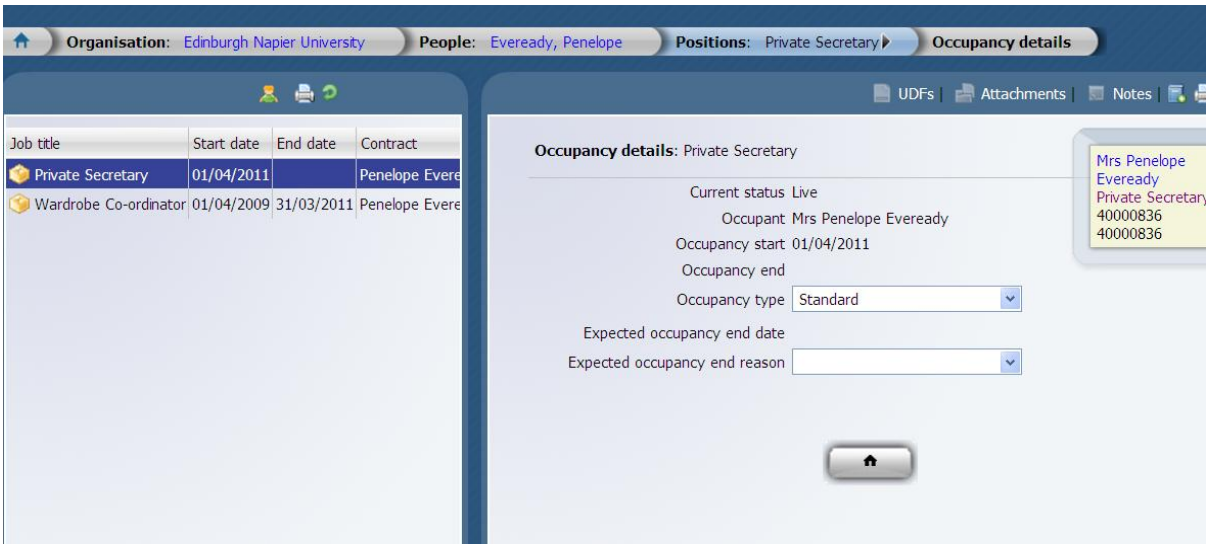
Position details are shown in the Display panel.
View available –
Job title / Position Start date / End date (if applicable) / position reference number/ probationary period (if applicable)/ Occupant name / Reporting Unit/ Reports to / Subject Group name(Structure Group 1) (if applicable)/ Location (Structure Group 2)

Occupancy details

Select employee
Click on **Occupancy details**



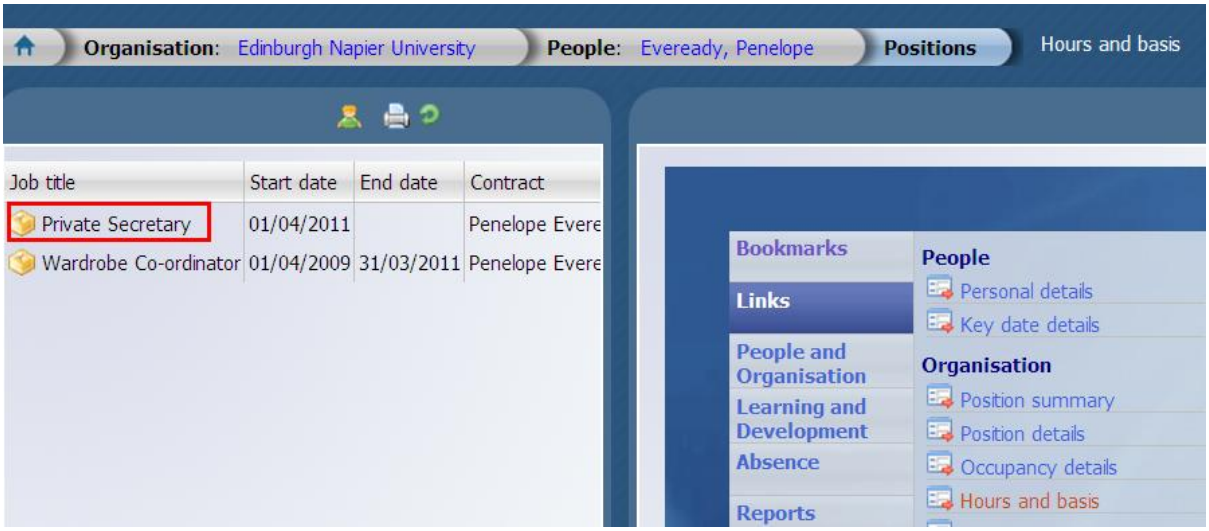
View Summary of Positions held in Object panel
Select position required



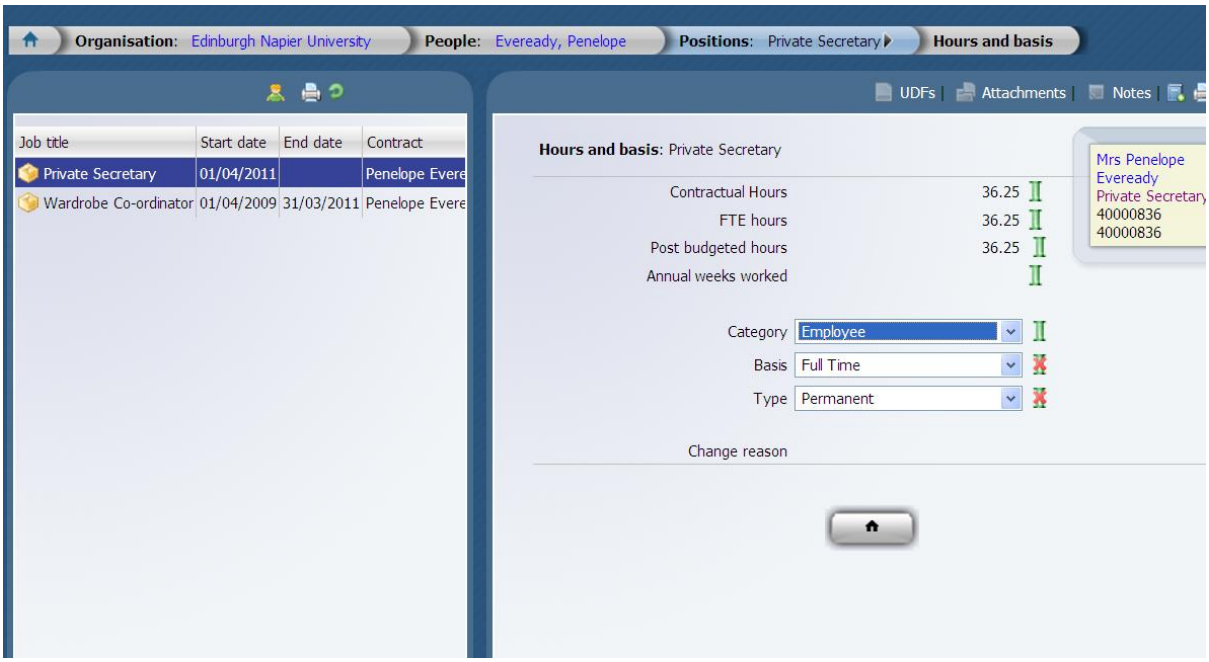
Occupancy details are shown in the Display panel.
View available – Current status / Occupant name / Occupancy start date / Occupancy type / Expected occupancy date / Expected Occupancy reason.

Hours and Basis

Select employee
Click on Hours and Basis



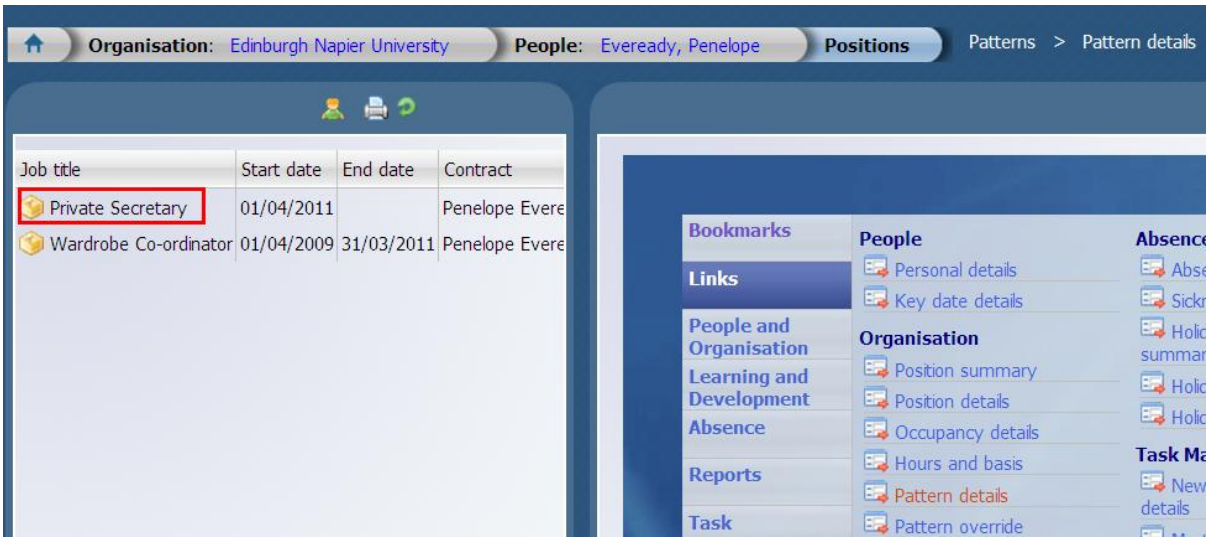
View Summary of Positions held in Object panel
Select position required



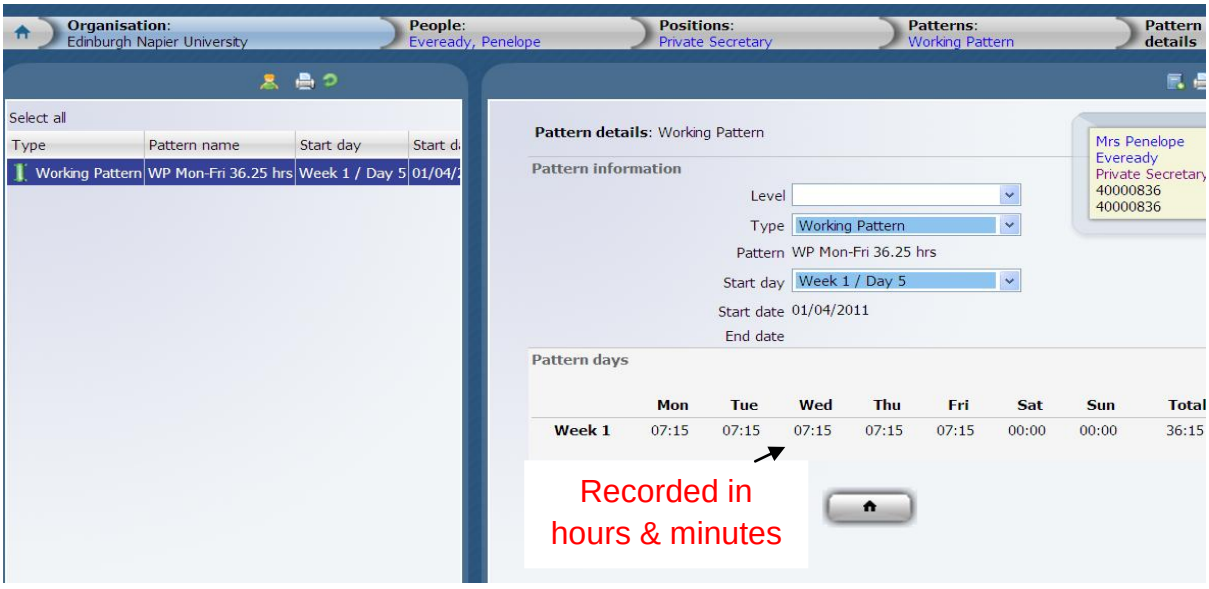
Hours and Basis are shown in the Display panel.
View available – Contracted Hours / FTE hours / Post budgeted hours / Category/ Basis / Type

Pattern details

Select employee
Click on Pattern Details



View Summary of Positions held in Object panel
Select position required

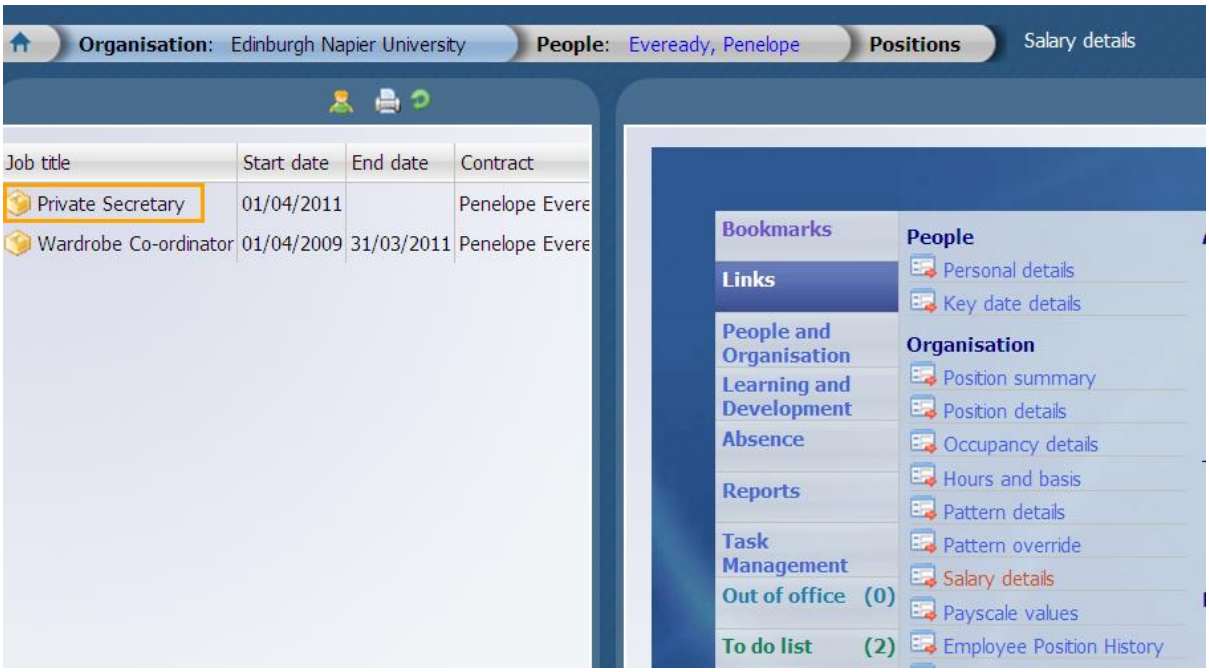


Pattern details are shown in the Display panel.
View available – Working pattern type/ Working pattern name/ Start date for working pattern/ Start date/ Pattern days display

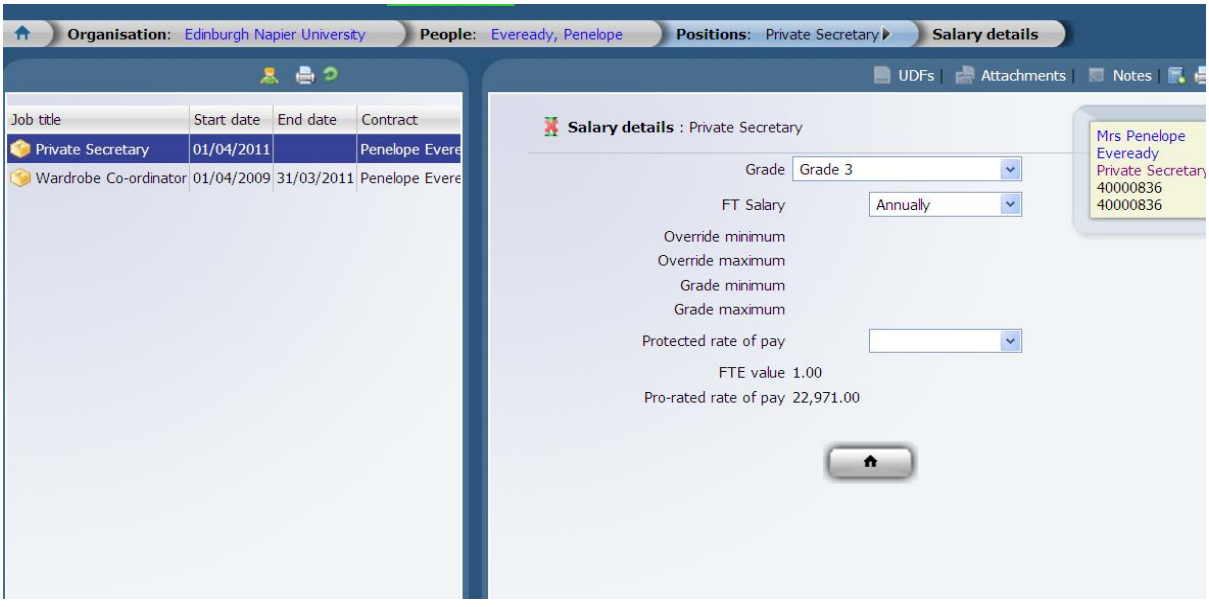
To change a work pattern you must complete an Employment details change form and send to HR.

Salary details

Select employee
Click on salary details



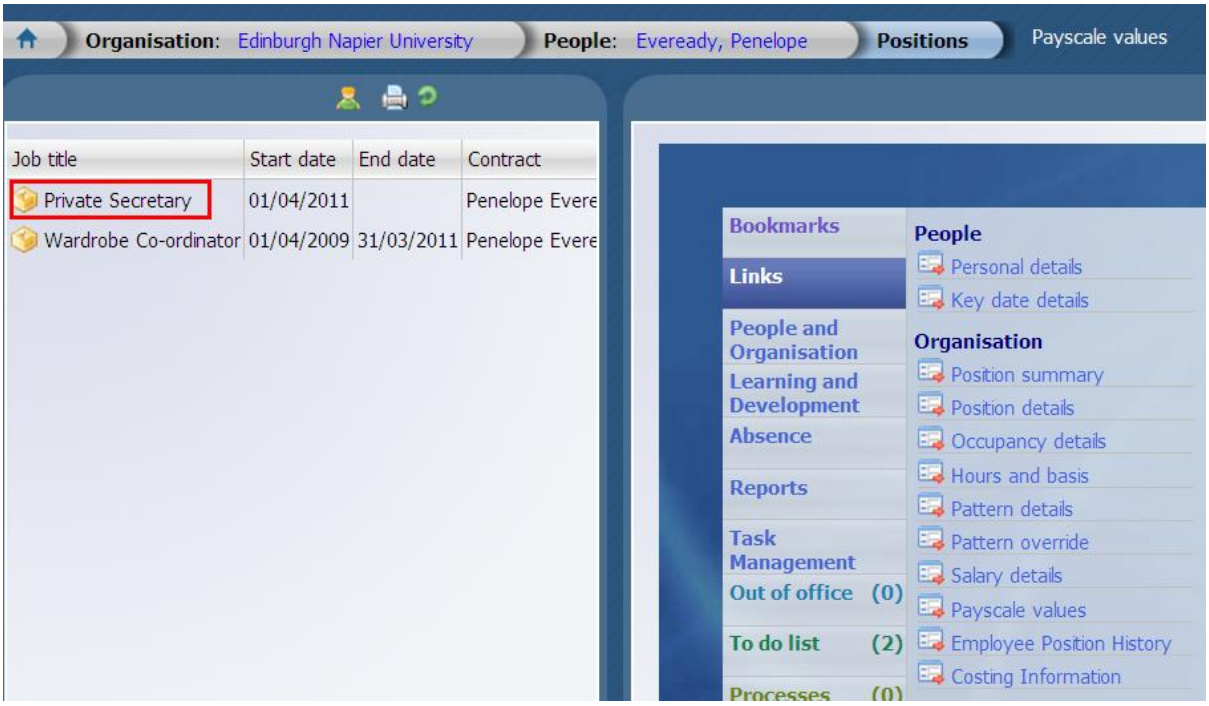
View Summary of Positions held in Object panel
Select position required



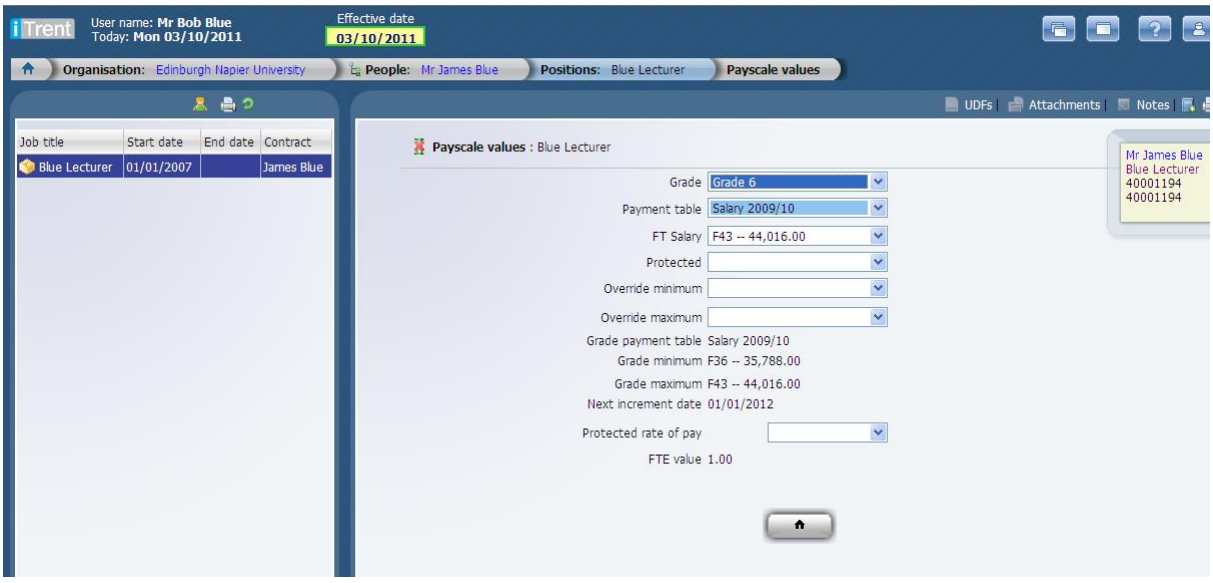
Pattern Override screen is shown in the Display panel.
View available – Grade / FT salary / Grade minimum / Grade maximum / Protected rate of pay (if applicable) FTE value/ Pro-rated rate of pay

Payscale Values

Select employee
Click on Payscale values



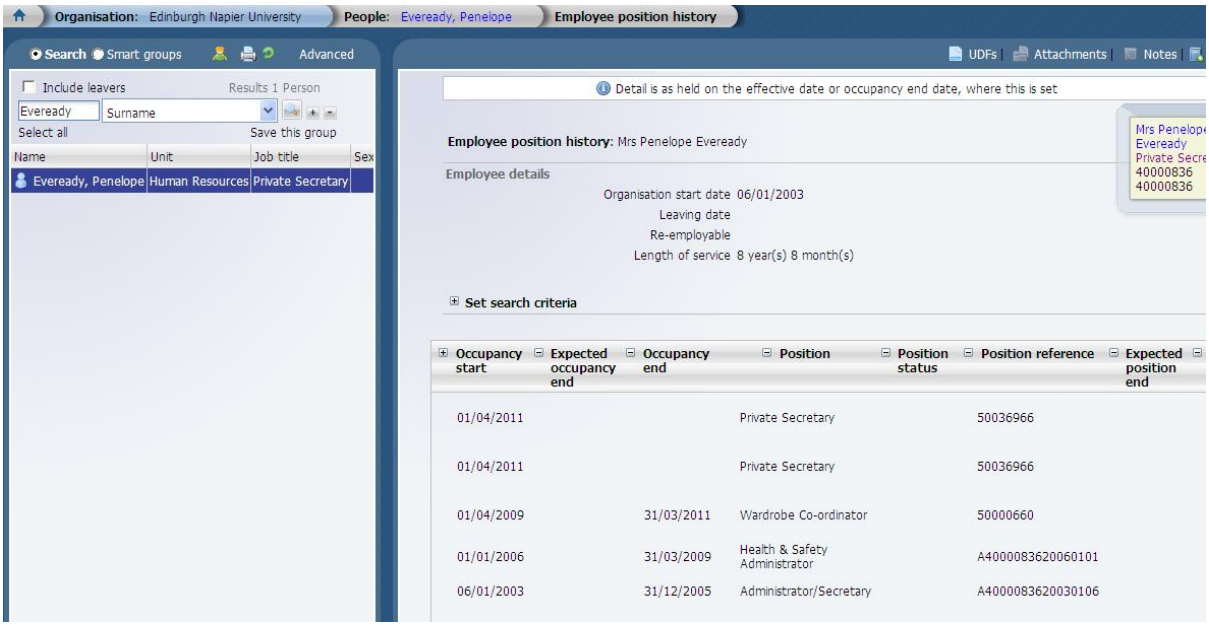
View Summary of Positions held in Object panel
Select position required



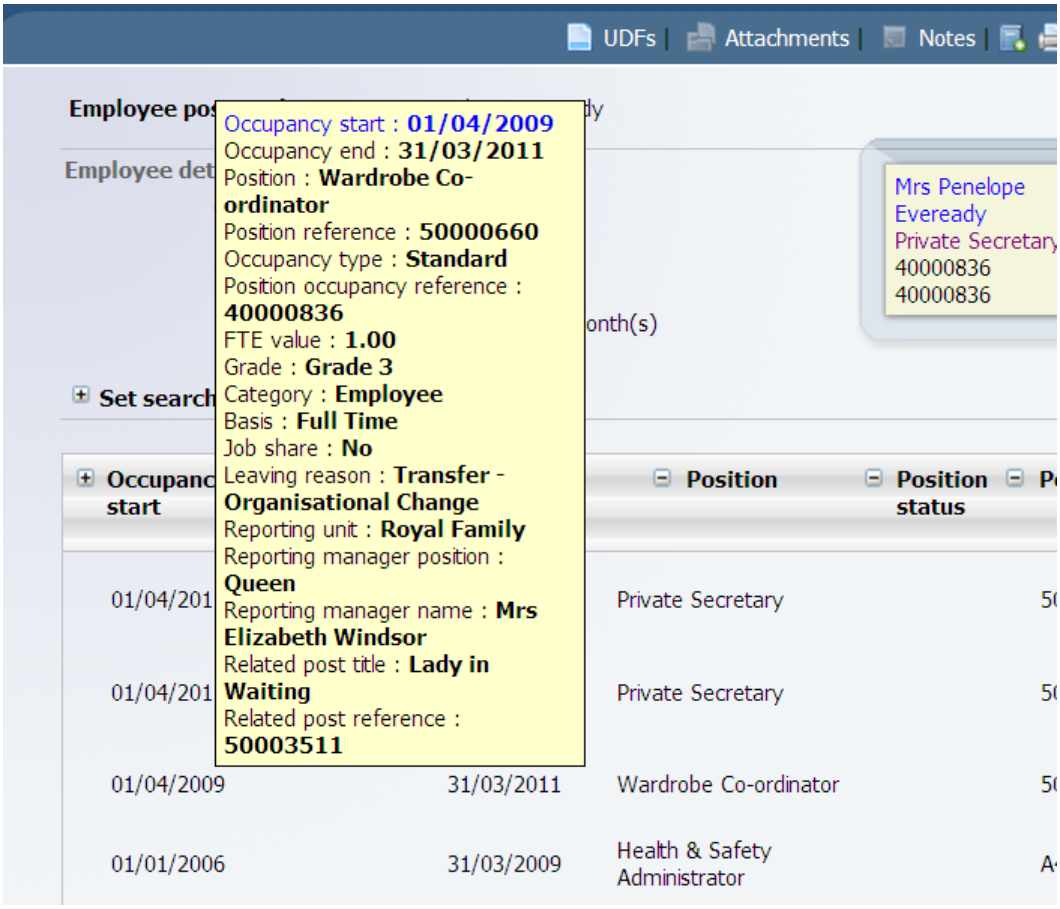
Payscale values screen is shown in the Display panel.
View available – Grade/ payment table / FT salary/ Grade minimum / grade maximum / Next increment date/ Protected rate of pay/ FTE

Employee Position History

Select employee
Click on **Employee Position History**

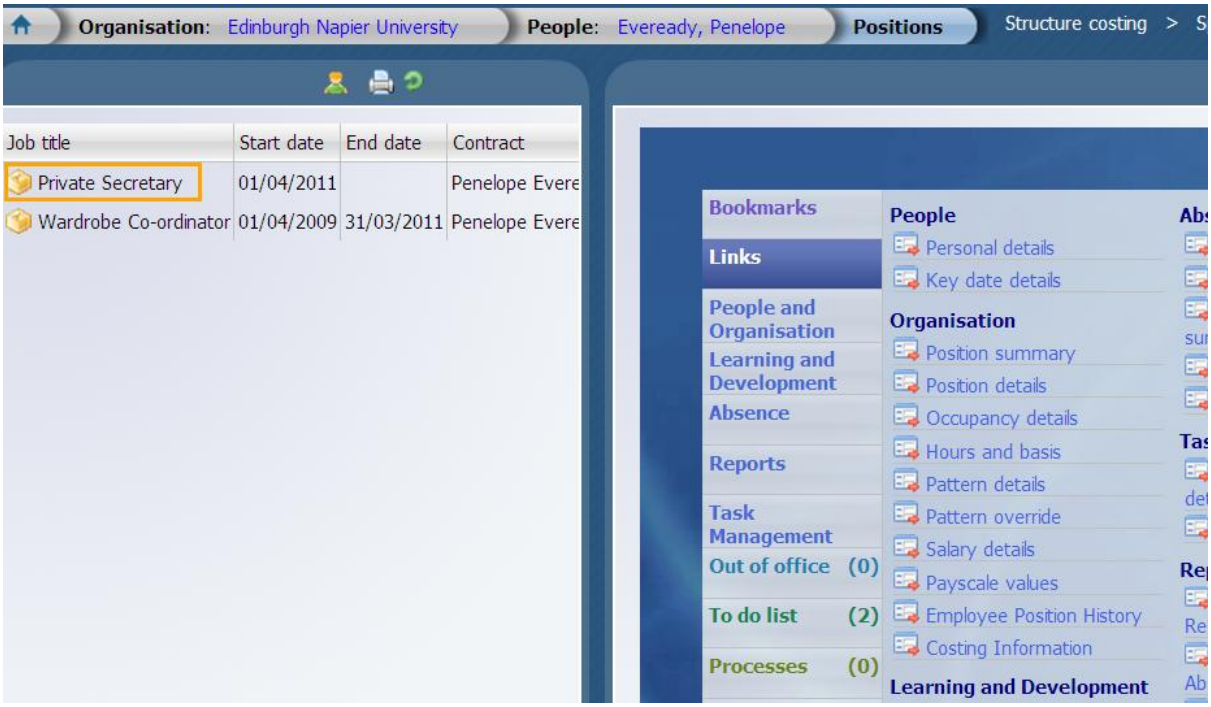


Hovering over a date field will provide a pop up summary box.

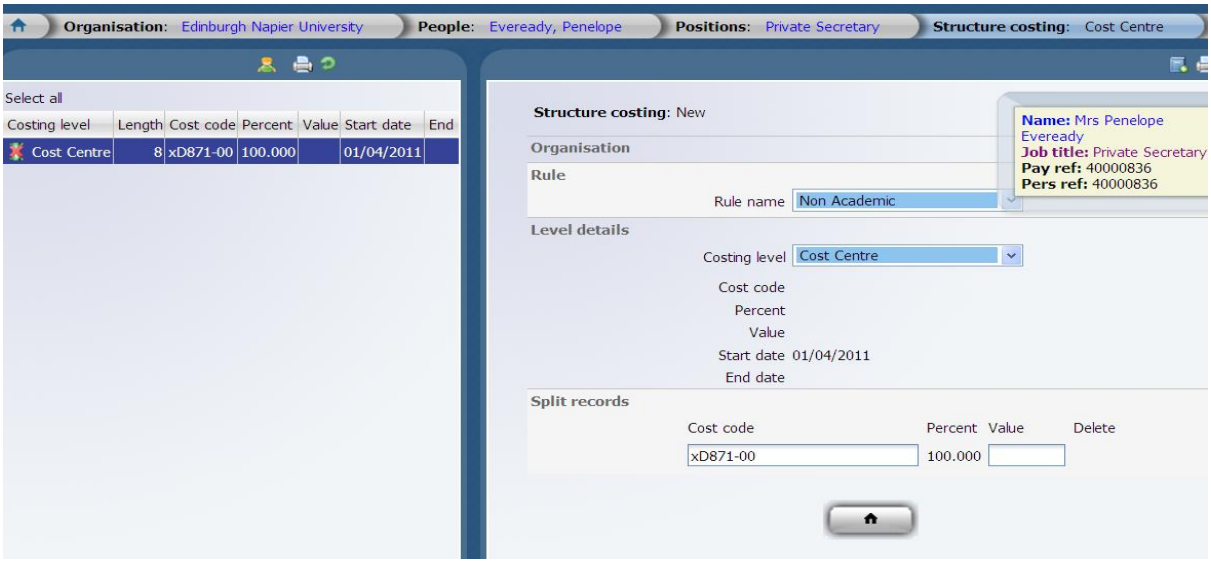


Costing Information

Select employee
Click on **Costing Information**



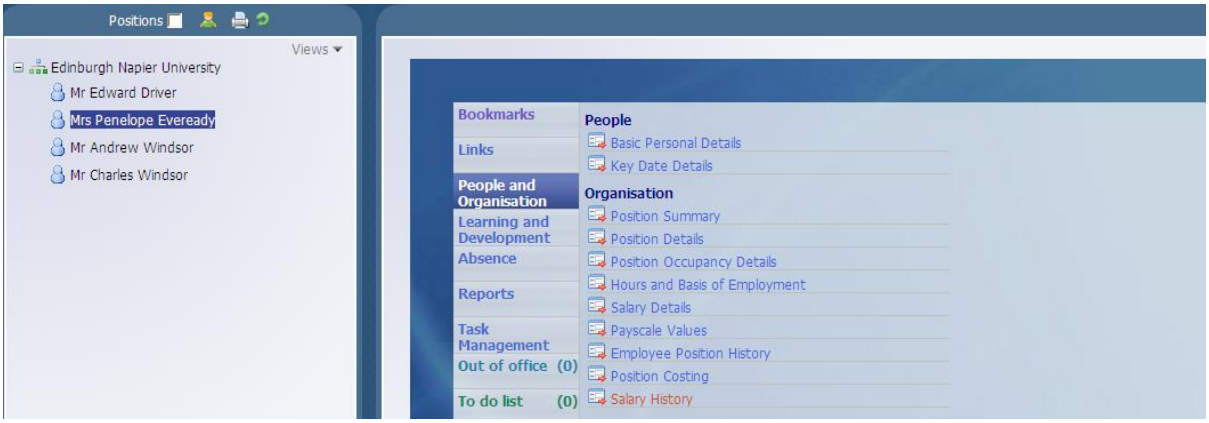
View Summary of Positions held in Object panel
Select position required



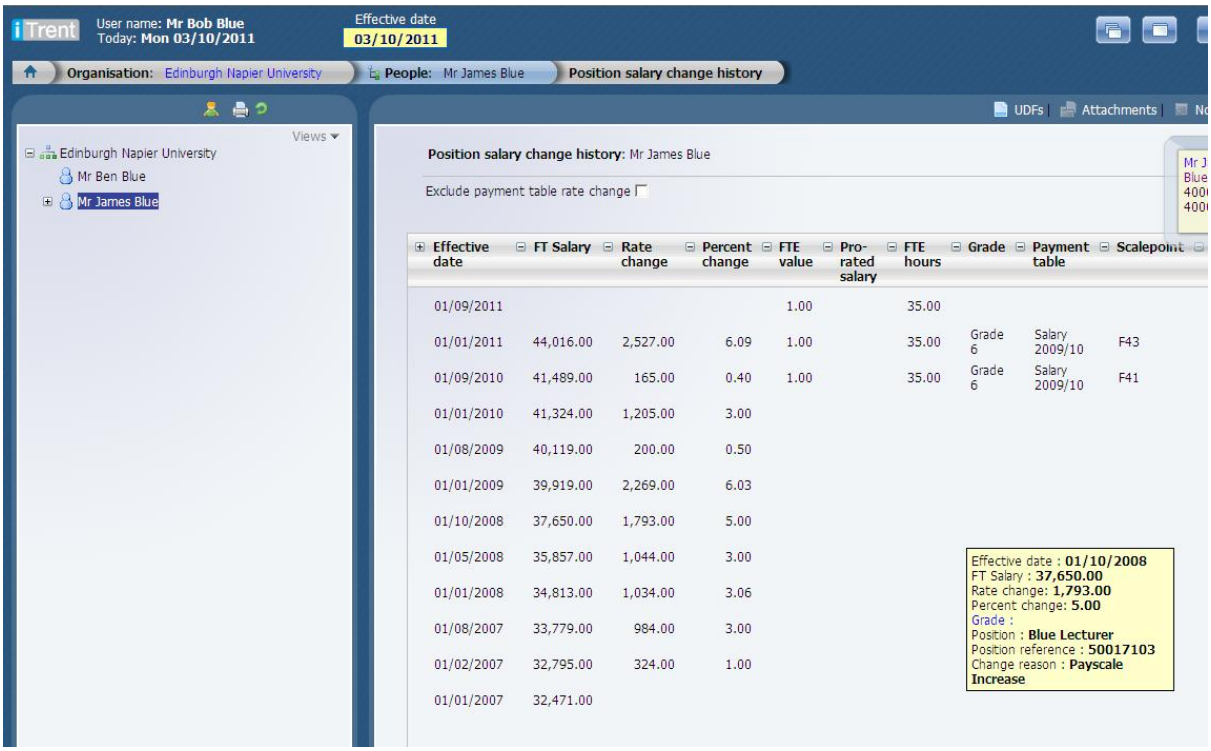
Cost Centre screen is shown in the Display panel.
View available – Cost centre / Start date / End date / Cost centre code / Cost centre split

PEOPLE AND ORGANISATION

Access to the People and Organisation section can either be from the Links folder or from the specific People and Organisation folder on the Home Page.



Salary History In addition to the pages on the Links folder, the People and Organisation folder also gives access to the salary history screen.



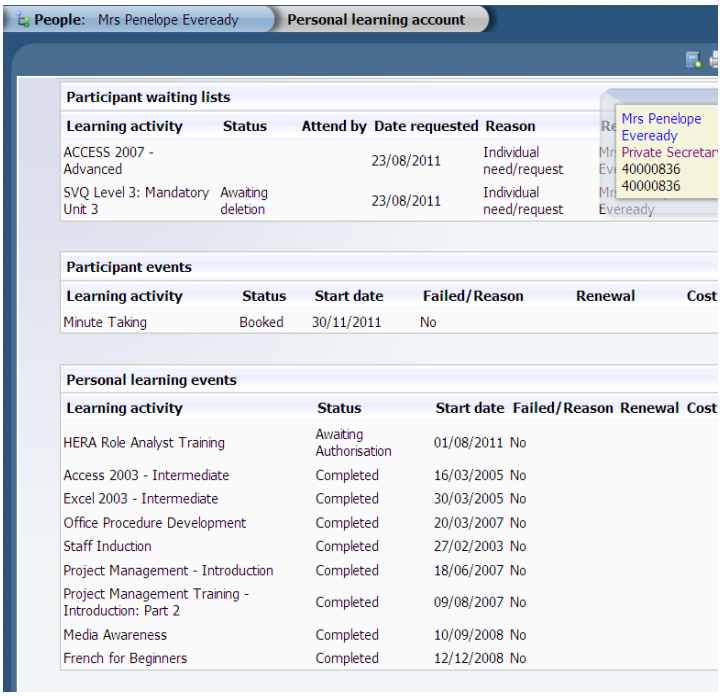
LEARNING AND DEVELOPMENT

Access to the Learning and development section can either be from the Links folder or from the Specific Learning and Development folder on the Home Page

Personal Learning Account

Select employee
Click on **Personal Learning Account**

This takes you into the Personal Learning Account screen which shows you


People: Mrs Penelope Eveready
Personal learning account
Participant waiting lists
Learning activity Status Attend by Date requested Reason
ACCESS 2007 - Advanced 23/08/2011 Individual need/request
SVQ Level 3: Mandatory Unit 3 Awaiting deletion 23/08/2011 Individual need/request
Mrs Penelope Eveready
Private Secretar
40000836
40000836
Participant events
Learning activity Status Start date Failed/Reason Renewal Cost
Minute Taking Booked 30/11/2011 No
Personal learning events
Learning activity Status Start date Failed/Reason Renewal Cost
HERA Role Analyst Training Awaiting Authorisation 01/08/2011 No
Access 2003 - Intermediate Completed 16/03/2005 No
Excel 2003 - Intermediate Completed 30/03/2005 No
Office Procedure Development Completed 20/03/2007 No
Staff Induction Completed 27/02/2003 No
Project Management - Introduction Completed 18/06/2007 No
Project Management Training - Introduction: Part 2 Completed 09/08/2007 No
Media Awareness Completed 10/09/2008 No
French for Beginners Completed 12/12/2008 No

Participant Waiting Lists – Any internal courses the employee is currently waiting to attend when space becomes available.

Participant events – Any internal course the employee is booked on, where a scheduled date has been provided.

Personal Learning Events – a historical record of any internally training events the employee attended pre November 2011, as well as any external events the employee has recorded within their personal learning Record via HR Connect Self Service.

ABSENCES

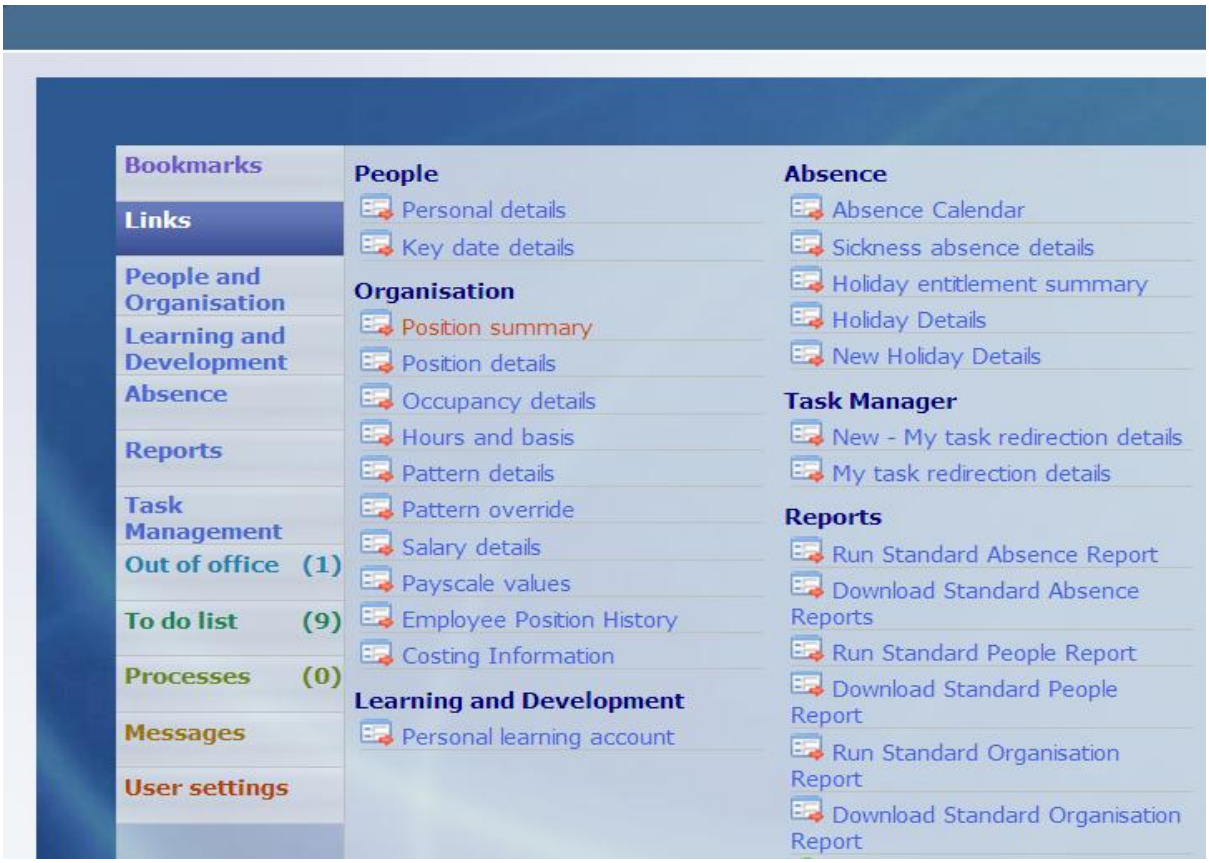
During Phase 1, the absence reporting procedures remain unchanged. On-line absence reporting through HR Connect will be rolled out in Phase two.

Guidance on recording Absence can be found on the HR Intranet.

Access to the Absence section can either be from the Links folder or from the specific Absences folder on the Home Page

Absence calendar

From Links Home Page
Click Absence calendar

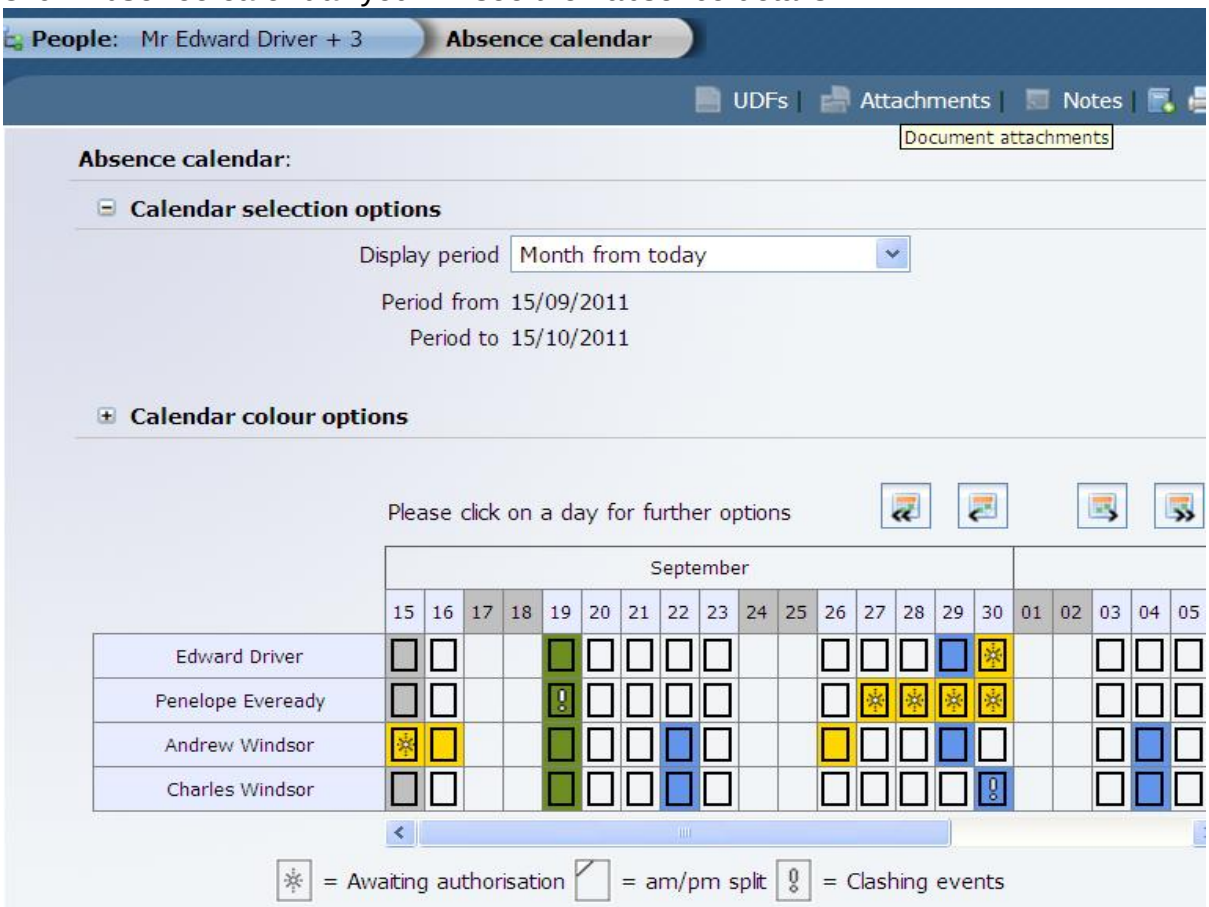


As a People Manager user you may wish to review any absences within your reportees.

Having searched for all your reportees you can then, if required, select all (or some) of them from the displayed list by using the

Ctrl key and click each required name:

Click **Absence calendar** you will see their absence details


People: Mr Edward Driver + 3
Absence calendar
UDFs | Attachments | Notes |
Document attachments
Absence calendar:
Calendar selection options
Display period Month from today
Period from 15/09/2011
Period to 15/10/2011
Calendar colour options
Please click on a day for further options
September
15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 01 02 03 04 05
Edward Driver
Penelope Eveready
Andrew Windsor
Charles Windsor
= Awaiting authorisation
= am/pm split
= Clashing events

The Absence calendar enables you to view, amend and create absences and related information for the selected list of people.

Overview

The Absence calendar displays all absences that you have recorded including:

- Fixed holidays - Green
- Personal holidays - Yellow
- Sickness - Red
- Learning activities - Blue
- Maternity / Paternity absences - Pink
- Adoption absences - Purple

NB – HR Connect does not show Time Off in Lieu or Flexi Leave, which may have been booked. Employees and Line Manager should continue to record this off-line.

The display has three sections:

1. Calendar selection options
2. Calendar colour options
3. The Calendar

Calendar selection options

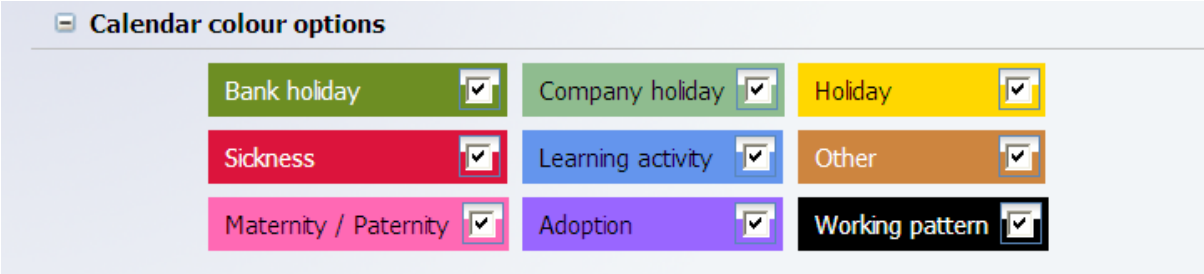
The Calendar selection options are displayed at the top of the page.

If required you can hide the options by clicking the minus icon - .

The display period can be changed by selecting drop down list items or change to an earlier or later start date using buttons above the calendar.

Calendar colour options

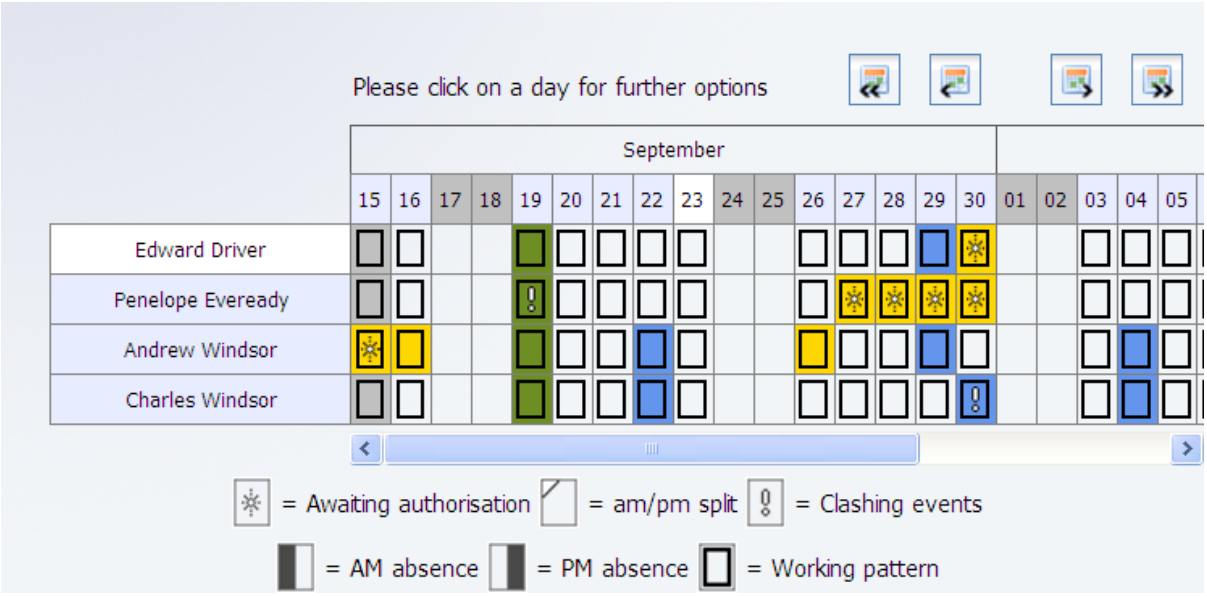
The Calendar colour options are initially displayed hidden. You can reveal the options by clicking the plus icon +



This section is also used to identify the absence types that you wish to have displayed on the calendar and the colour that they will be displayed in. Any colour changes will be reflected in the Out of Office section of the Home page.

The Calendar

The people that the calendar relates to are shown on the left hand side.


Please click on a day for further options
September
15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 01 02 03 04 05
Edward Driver
Penelope Eveready
Andrew Windsor
Charles Windsor
= Awaiting authorisation
= am/pm split
= Clashing events
= AM absence
= PM absence
= Working pattern

Each absence is shown as a coloured box. The colours of each type of absence are controlled by each user with a standard set being initially provided.

When the display period or the number of people exceeds the screen capacity, scroll bars are provided to enable you to move left or right and/or up and down.

The headings to the calendar and the people names will always remain in focus.

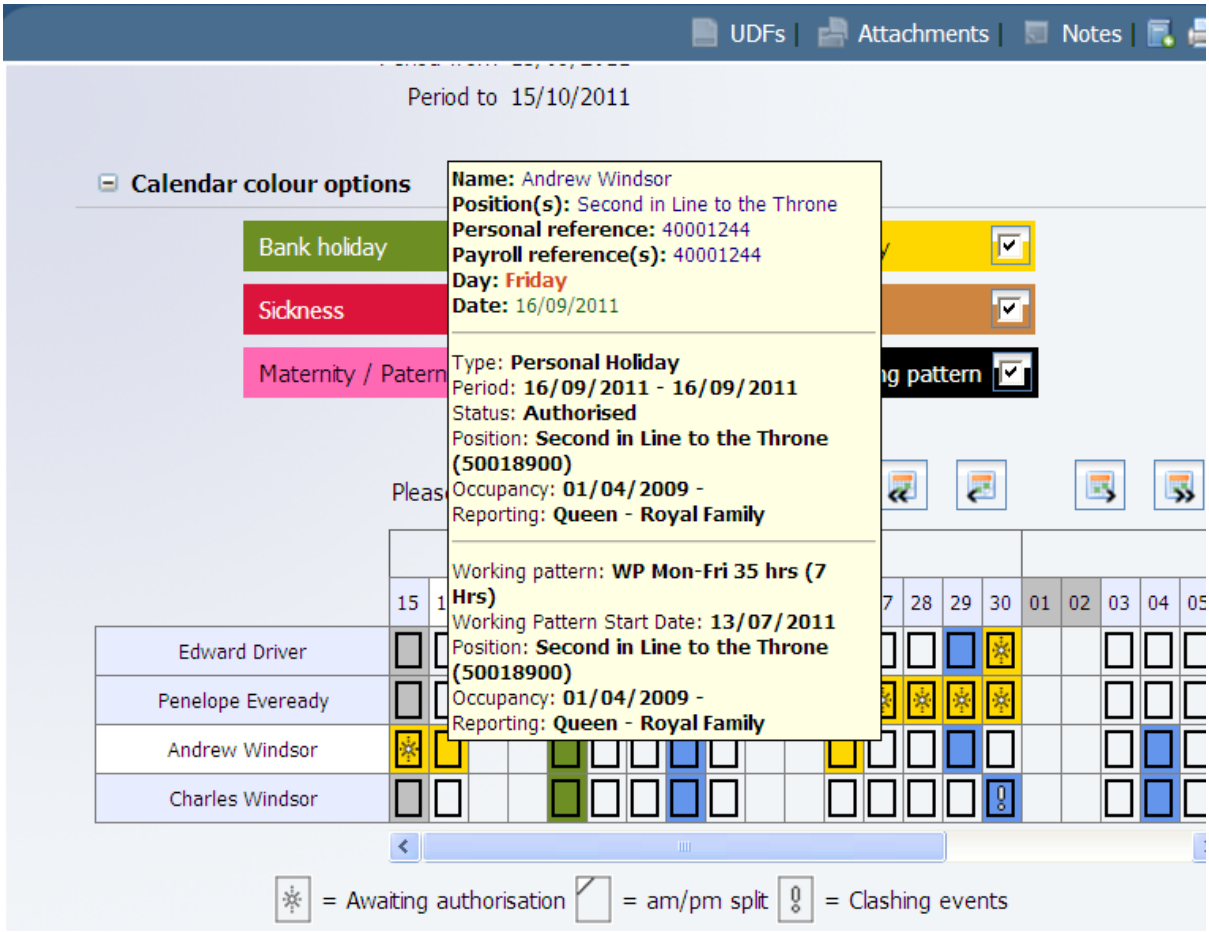
Calendar display

The people displayed are either the people that you selected when navigating to the page.

The grid for the calendar displays absences and training using the colour codes defined by the filter.

Weekends are shown shaded in the day number display as above

When you move the cursor over the cells in the display a pop up is shown, holding the details of either the absence or the person, when no absence is recorded.



The name of the person, their position(s) and the Day and Date is displayed.

Note also that the name of the person and the day selected are shown with a white background. When the cursor is on a cell which has a recorded absence the pop up information will be similar to the following:

The first section displays the name of the person, their position(s) and the Day and Date is displayed.

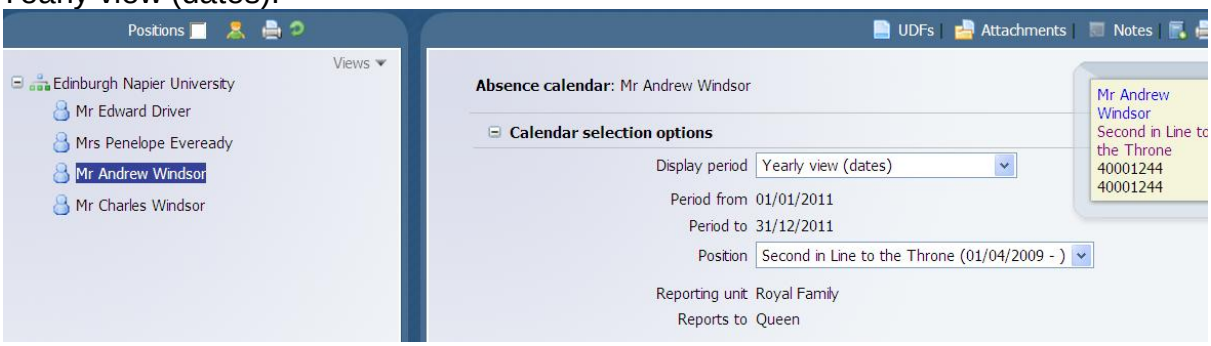
The next section displays the Type of absence and its period and its status. The position to which the absence has been applied, the persons Occupancy dates in the position and the Reporting manager of the position.

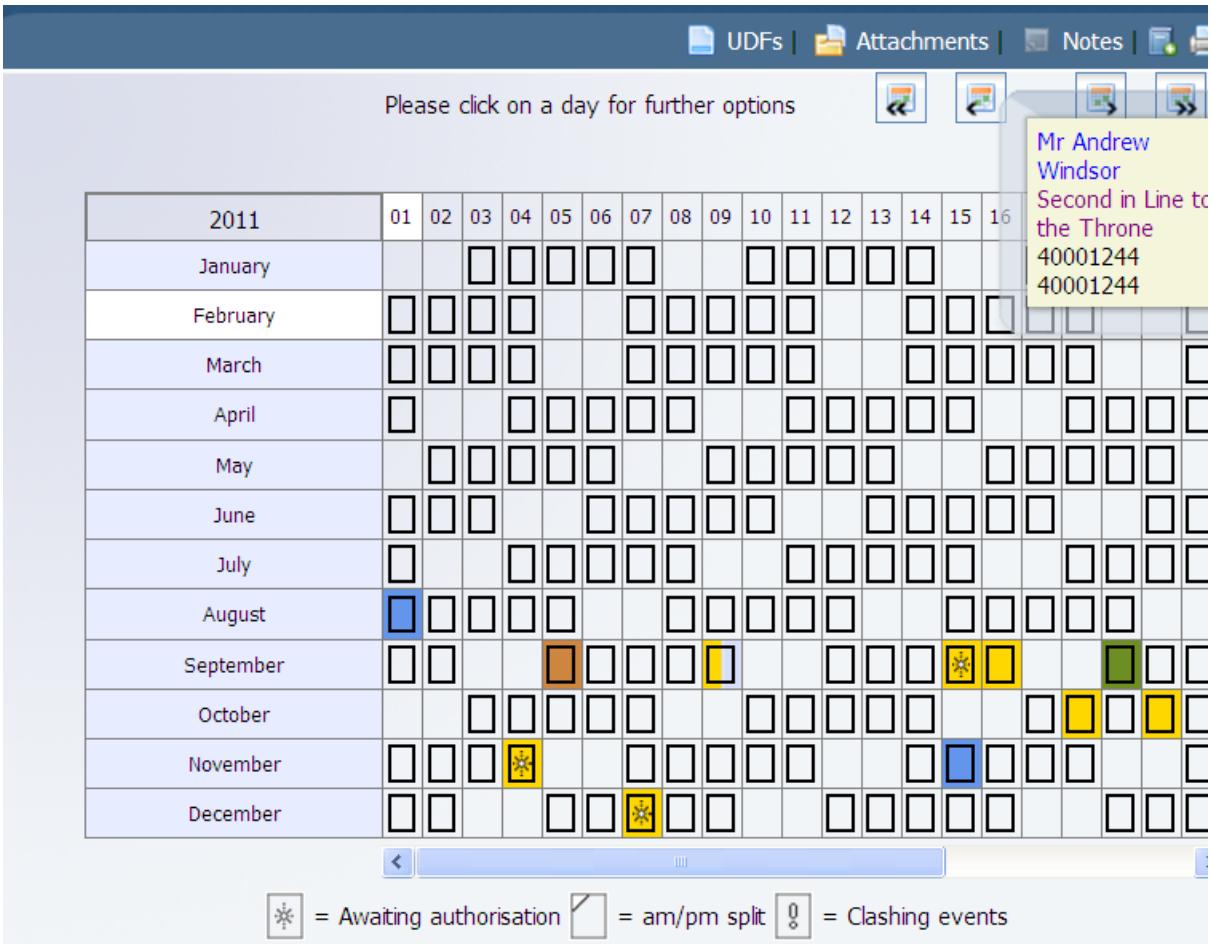
If the Absence is applied to several positions then each position will be reported in a separate section.

NB- The absence calendar does not link with the Outlook calendar.

Absence Calendar / Yearly View (Dates)

When a single employee has been selected you are able to display the calendar in Yearly view (dates):





The calendar will show, for the selected person / absence, the months of the year down the left side of the calendar. Across the display are shown the dates. Each absence is shown with its colour code. Details about each absence day are displayed as pop ups, as you move your cursor over the dates.

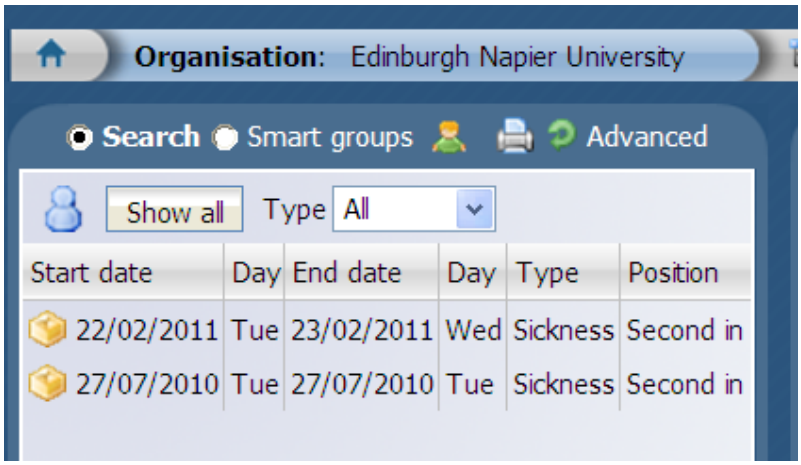
Sickness Absence Details

Select employee

Click on Sickness Absence Details

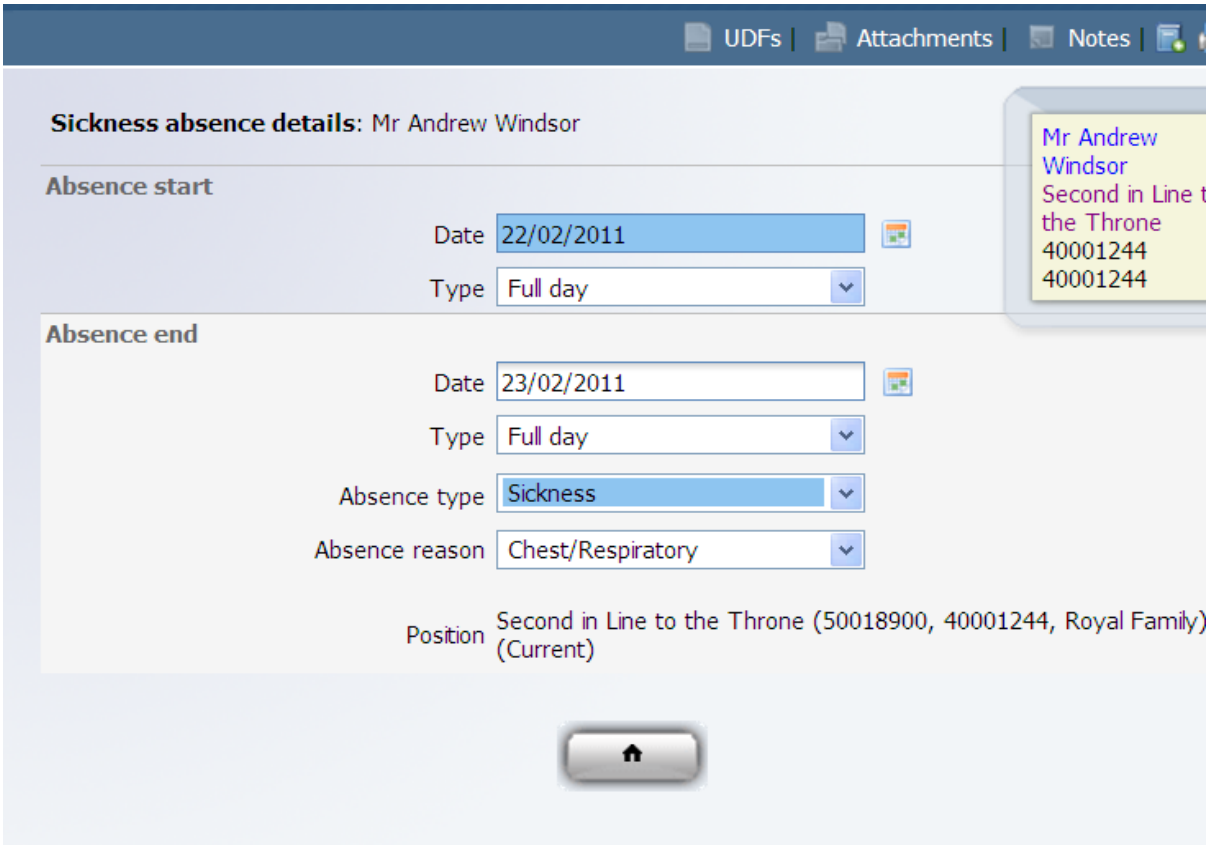
View **Summary of Sickness Absences** held in Display panel.

NB - In Phase One these screens will show sickness absences which have been reported up until the previous month. It will also include future long term absences, where the Medical Fit Note shows a future date as well as maternity and paternity leave. Once On-line absence recording comes into effect in Phase Two, this information will be real time data.



Select the **absence date** you want to see

View available – Absence start date and type / Absence end date and type / Absence type and reason/ position


UDFs | Attachments | Notes |
Sickness absence details: Mr Andrew Windsor
Mr Andrew Windsor
Second in Line t
the Throne
40001244
40001244
Absence start
Date 22/02/2011
Type Full day
Absence end
Date 23/02/2011
Type Full day
Absence type Sickness
Absence reason Chest/Respiratory
Position Second in Line to the Throne (50018900, 40001244, Royal Family) (Current)

Holiday entitlement summary

Select employee

Click on **Holiday entitlement summary**

Holiday entitlement summary appears in the Display Panel

Holiday entitlement summary:

Mr Andrew Windsor
Second in Line to the Throne
40001244
40001244

Employment details

Position: Second in Line to the Throne

Period details

Holiday period dates: 01/09/2011 - 31/08/2012
Length of service at relevant date: 4 year(s) 5 month(s) 27 day(s)
Scheme name: HE2000 Annual Leave
Membership dates: 01/09/2011 -
Entitlement for period: 322 hours (322 hours Pro Rata)

From	To	Duration	Remaining entitlement
09/09/2011	09/09/2011	3.5	318.5
15/09/2011	15/09/2011	7	311.5
16/09/2011	16/09/2011	7	304.5
19/09/2011	19/09/2011	7	297.5
26/09/2011	26/09/2011	7	290.5
18/10/2011	18/10/2011	7	283.5
20/10/2011	20/10/2011	7	276.5
04/11/2011	04/11/2011	7	269.5
25/11/2011	25/11/2011	7	262.5

NB - Duration is recorded in decimals and not hours and minutes

View available –
Position Selection / Holiday period dates (defaults to Annual leave year) / Length of service at date/ Scheme name / Membership date (will be 01/09/year unless a new start or have transferred position) / Full time entitlement for period shown in hours (Pro rata entitlement) / Any holidays brought forward / Adjustments (only if present)

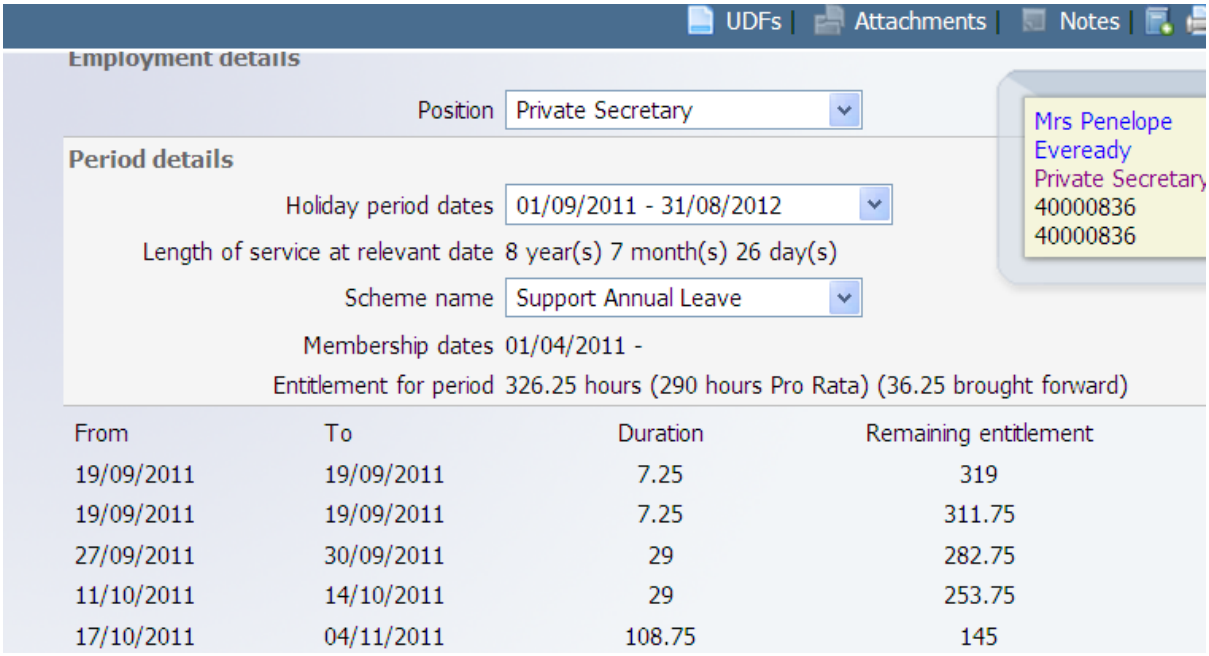
HR Connect automatically calculates annual leave entitlements for all staff types, using the holiday entitlements outlined in your contract, your working pattern and the Annual leave guidelines on the HR Intranet.

Pro-rating takes place if an employee is part time, starts their employment part way through the year or is on a fixed term contract where the expected occupancy end date is before the end of the year leave.

The holiday entitlement includes both the personal leave and fixed leave entitlements combined together.

Fixed holidays (known in the system as Bank Holidays) are input centrally. Hours will be deducted if the employees work pattern indicates that they work on that day. The days will automatically be marked as taken on the leave taken list. Personal leave can be booked through Employee self service and then authorised by the line manager. The Holiday authorisation process is detailed later in the document. Personal leave is deducted in hours, showing the remaining entitlement available.

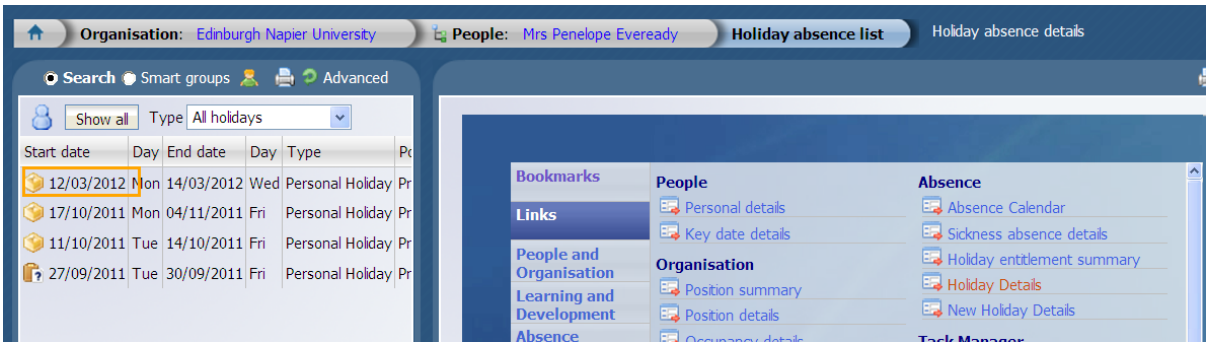
If you have concerns about the leave entitlement calculations, please contact the HR Connect helpdesk.


UDFs | Attachments | Notes |
Employment details
Position Private Secretary
Mrs Penelope Eveready
Private Secretary
40000836
40000836
Period details
Holiday period dates 01/09/2011 - 31/08/2012
Length of service at relevant date 8 year(s) 7 month(s) 26 day(s)
Scheme name Support Annual Leave
Membership dates 01/04/2011 -
Entitlement for period 326.25 hours (290 hours Pro Rata) (36.25 brought forward)
From To Duration Remaining entitlement
19/09/2011 19/09/2011 7.25 319
19/09/2011 19/09/2011 7.25 311.75
27/09/2011 30/09/2011 29 282.75
11/10/2011 14/10/2011 29 253.75
17/10/2011 04/11/2011 108.75 145

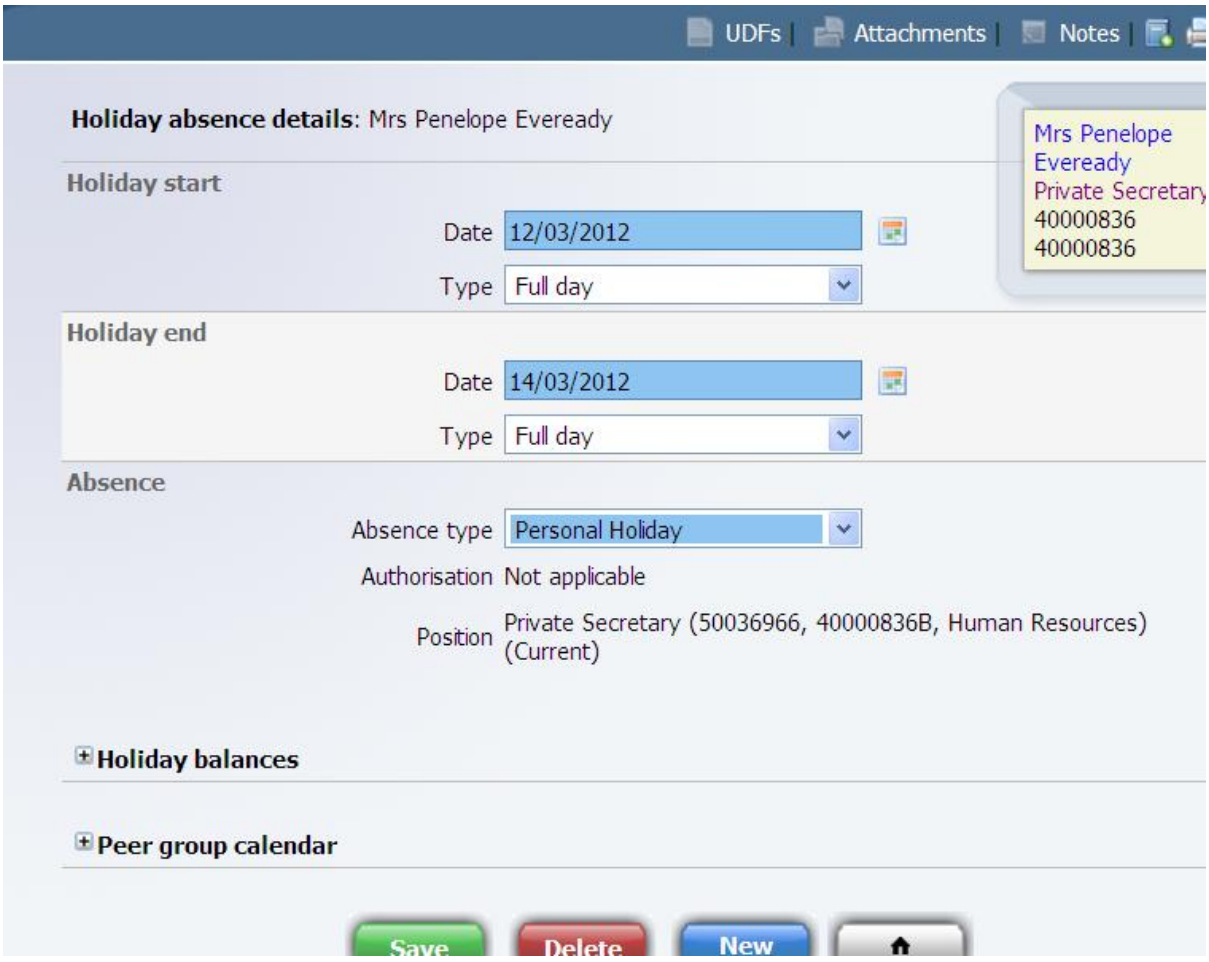
Holiday Details

Select employee

Click on **Holiday details**



A summary of holiday dates is shown in the Object panel

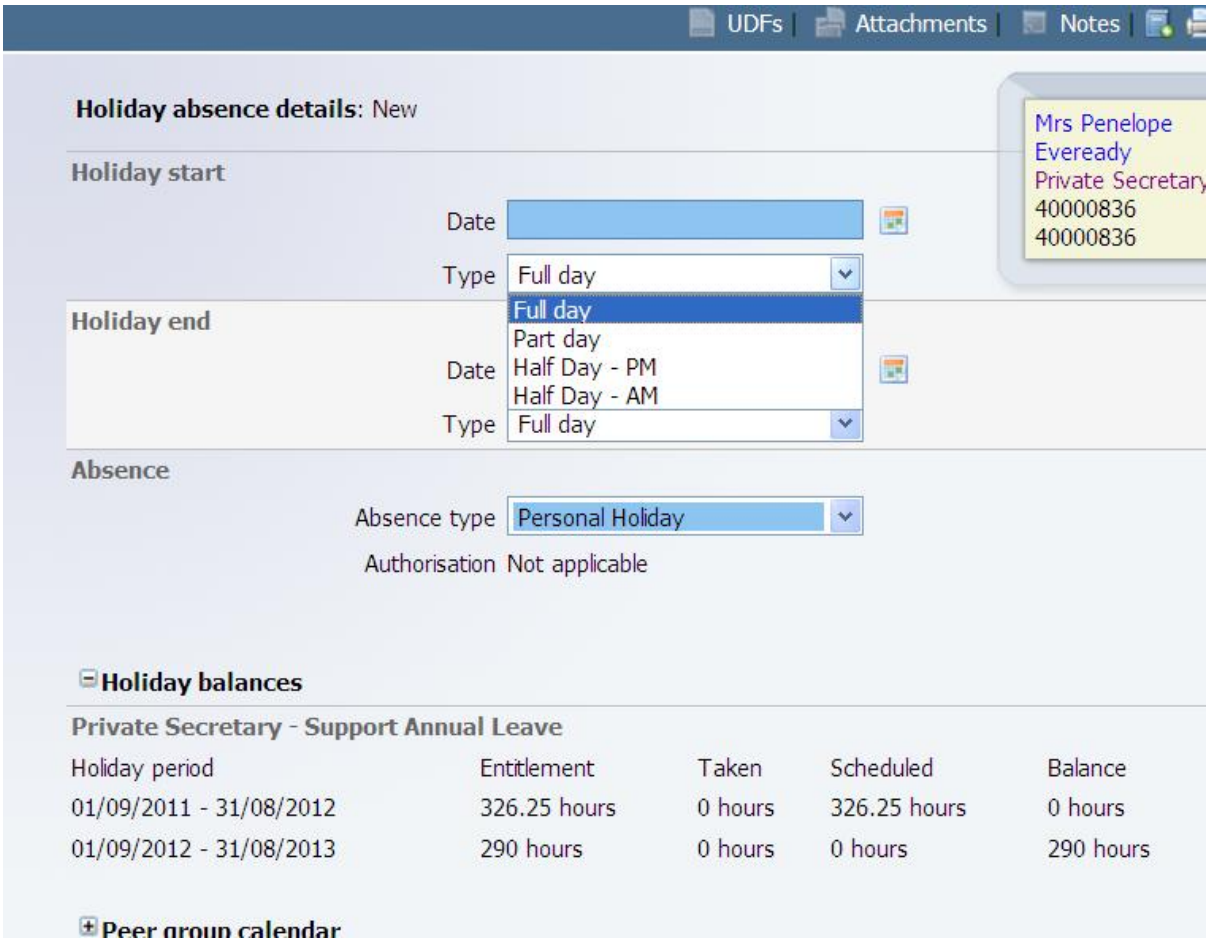


View available – Holiday start date / Duration / Holiday end date/ duration/ Absence type / Holiday balances/ Peer group calendar.

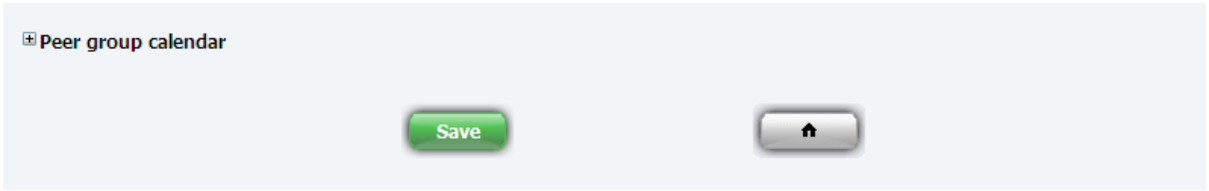
New Holiday details

This allows you to enter holiday details on behalf of your employee

Click employee
Select **New Holiday details**
New Holiday details



Enter the Start date
Select Type from drop down - full day/ part day/ AM/ PM
Select Absence type
Check available holiday balance or peer calendar if required
Press save



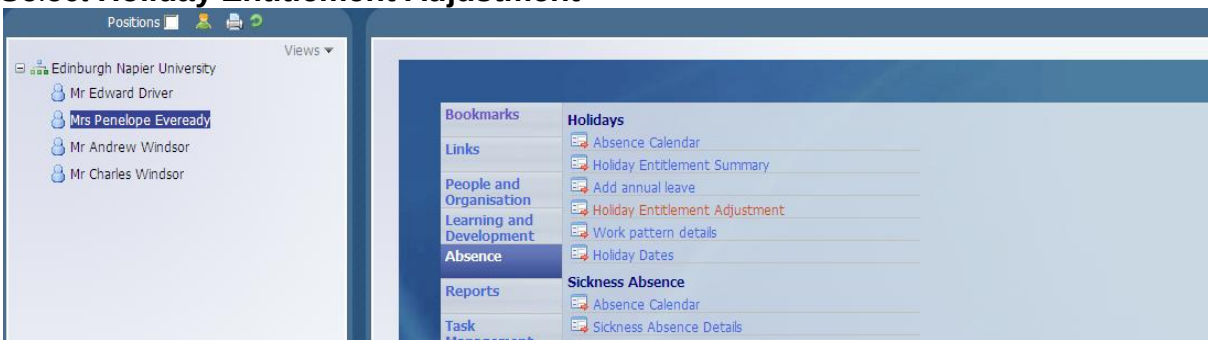
In addition to the pages on the Links folder, the Absence Folder also gives access to the following Absence screens.

Holiday Entitlements Adjustments

Line managers can adjust system calculated holidays to take account of the following circumstances.

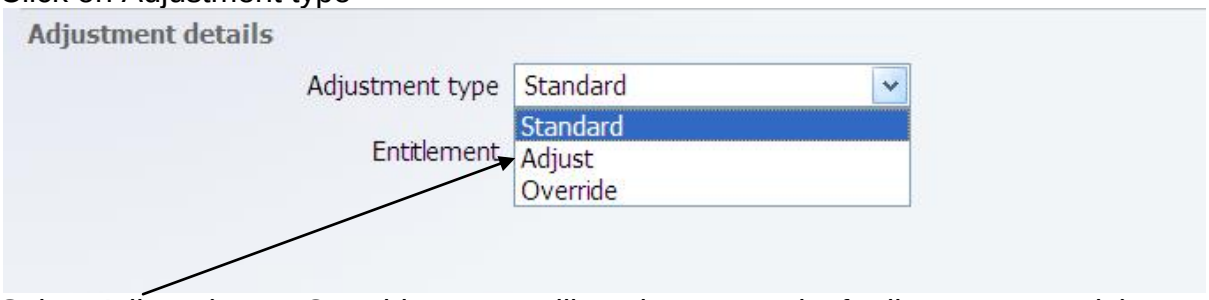
1. In the 2011/2012 holiday year if the employee has un-used holiday to carry over (to a maximum of 5 working days, unless been on Maternity or Adoption leave in previous year)
   NB – This carry forward will be automatic in the 2012/2013 holiday year
2. Employee has “Borrowed” some entitlement from the new holiday year
3. The employee has worked on a Fixed holiday and is entitled to have leave which was automatically deducted re-instated.

Click employee
Select **Holiday Entitlement Adjustment**



The Holiday Entitlement Adjustment screen is displayed

Click on Adjustment type



Select Adjust (never Override or you will not have a track of adjustments made)

Enter value for adjustment in **hours**

- Negative if reducing leave entitlement for holiday period
- Positive if adding to leave entitlement for holiday period
-

NB – in future years carry forward is automated

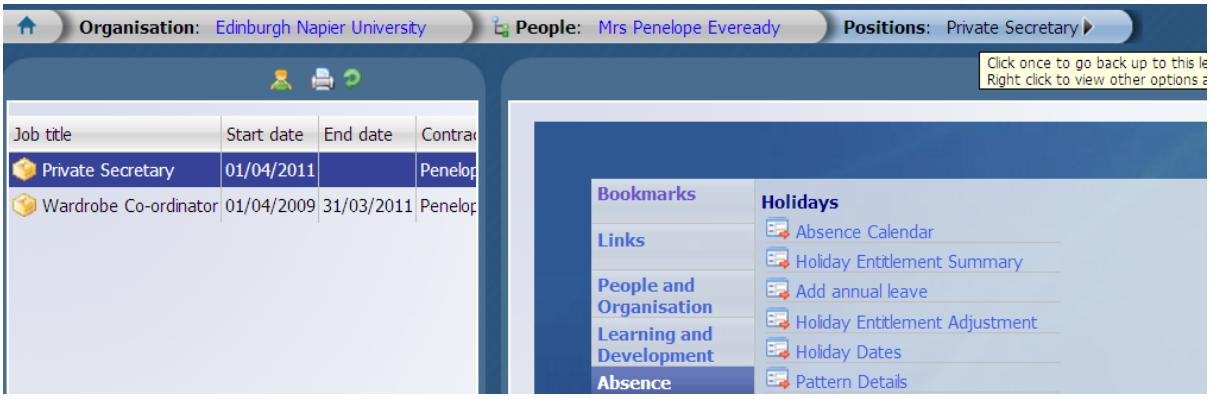
Enter reason e.g. carry over 5 days from 2010/2011 leave year.

Pattern details

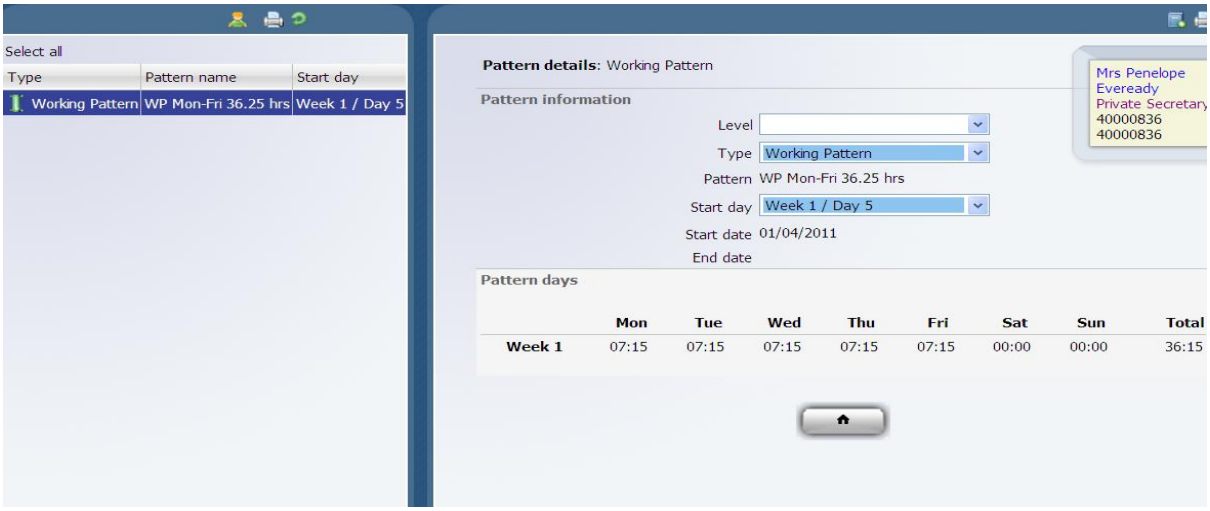
Click employee

Select **Pattern Details**

Select Position

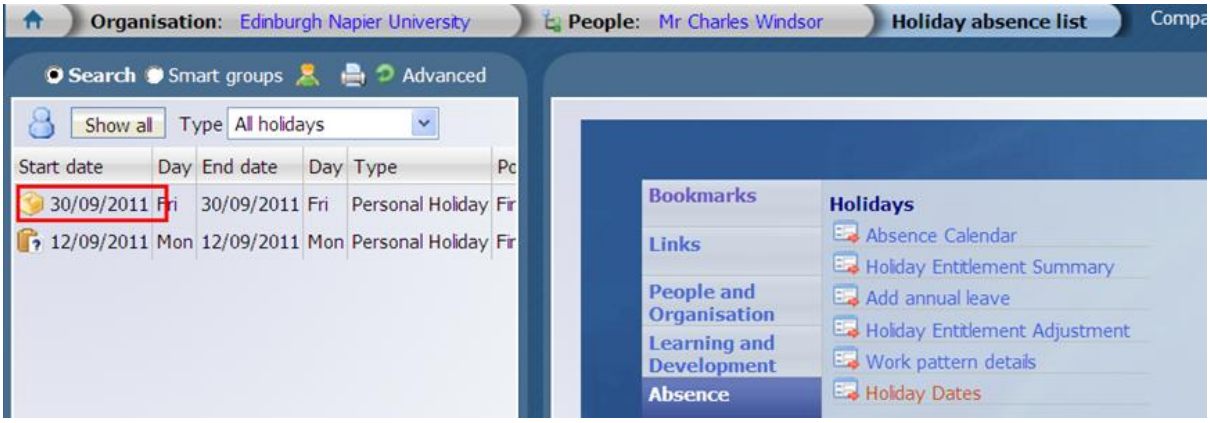


You will see the current Working Pattern details

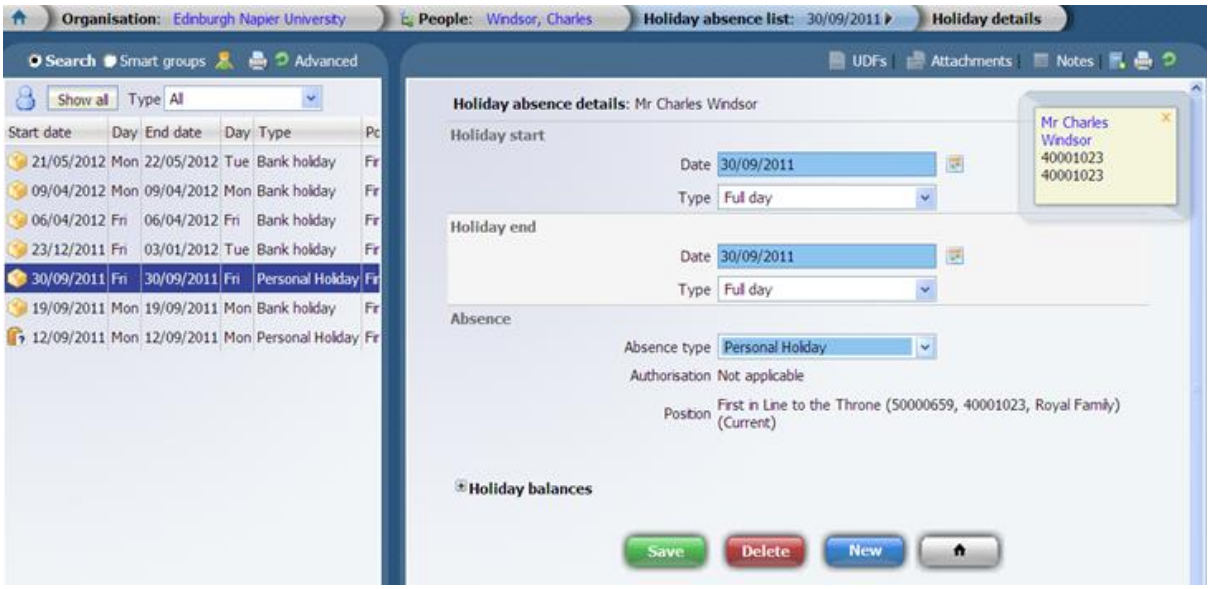


Holiday dates

To see booked holiday dates
Select the person and click Holiday dates



Select the date you want to view



Only Line Managers can remove leave that was due to be taken in the past but not actually taken. This cannot be done by the individual in HR Connect Self Service.

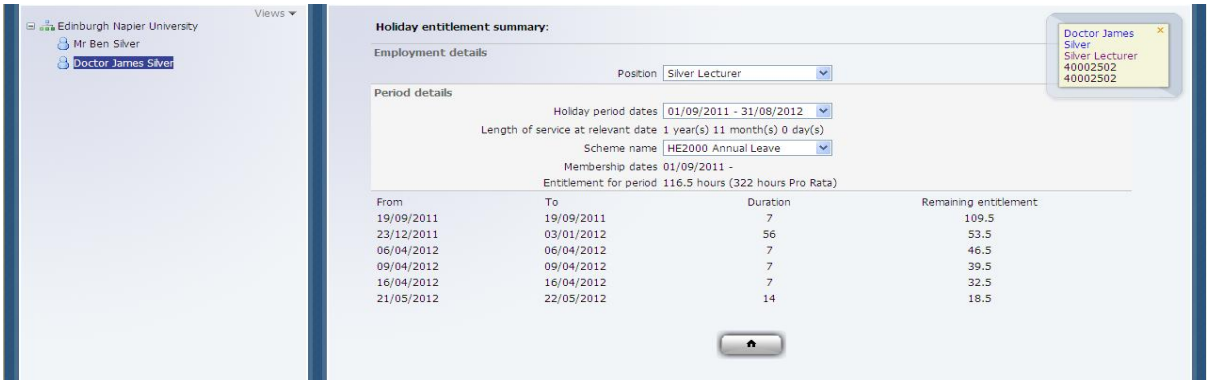
You may also need to delete leave if someone is absent for another reason on a day when holiday was booked.

You can also add Personal Holiday to an employees record. The entitlement calculation runs overnight so the holiday entitlement summary will be updated at that point.

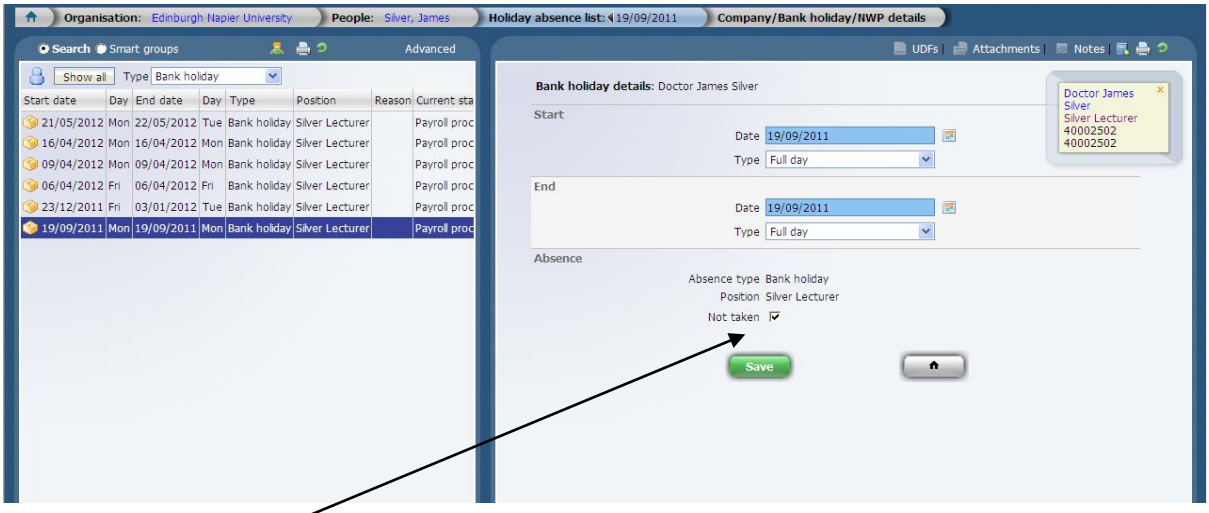
Working on a Bank Holiday

If your member of staff works on a Bank holiday and will therefore need to take the time at a later date, you will need to update the Bank holiday details for the date concerned.

In this example, James worked on 19/09/2011 – the duration for that day is 7 hours and his entitlement has been reduced accordingly.


Edinburgh Napier University
Mr Ben Silver
Doctor James Silver
Holiday entitlement summary:
Employment details
Position Silver Lecturer
Period details
Holiday period dates 01/09/2011 - 31/08/2012
Length of service at relevant date 1 year(s) 11 month(s) 0 day(s)
Scheme name HE2000 Annual Leave
Membership dates 01/09/2011 -
Entitlement for period 116.5 hours (322 hours Pro Rata)
From To Duration Remaining entitlement
19/09/2011 19/09/2011 7 109.5
23/12/2011 03/01/2012 56 53.5
06/04/2012 06/04/2012 7 46.5
09/04/2012 09/04/2012 7 39.5
16/04/2012 16/04/2012 7 32.5
21/05/2012 22/05/2012 14 18.5
Doctor James Silver
Silver Lecturer
40002502
40002502

Select **Holiday Dates** the highlight the date that was worked.



Click in the **Not Taken** tick box and clicked **Save.**

Following the overnight absence calculation the holiday entitlement summary looks like this. You can see that duration on 19/9 has become 0 hence 7 hours is now available to be booked as a personal holiday. If the time to be taken back is at time a half then the holiday entitlement must be adjusted too, in this case 3.5 hours.

Holiday entitlement summary:
Employment details
Position Silver Lecturer
Period details
Holiday period dates 01/09/2011 - 31/08/2012
Length of service at relevant date 1 year(s) 11 month(s) 0 day(s)
Scheme name HE2000 Annual Leave
Membership dates 01/09/2011 -
Entitlement for period 116.5 hours (322 hours Pro Rata)
From To Duration Remaining entitlement
19/09/2011 19/09/2011 0 116.5
23/12/2011 03/01/2012 56 60.5
06/04/2012 06/04/2012 7 53.5
09/04/2012 09/04/2012 7 46.5
16/04/2012 16/04/2012 7 39.5
21/05/2012 22/05/2012 14 25.5
Doctor James Silver
Silver Lecturer
40002502
40002502

Sickness Absence

The Absence calendar and Sickness Absence details screen have been detailed in the Links section above.

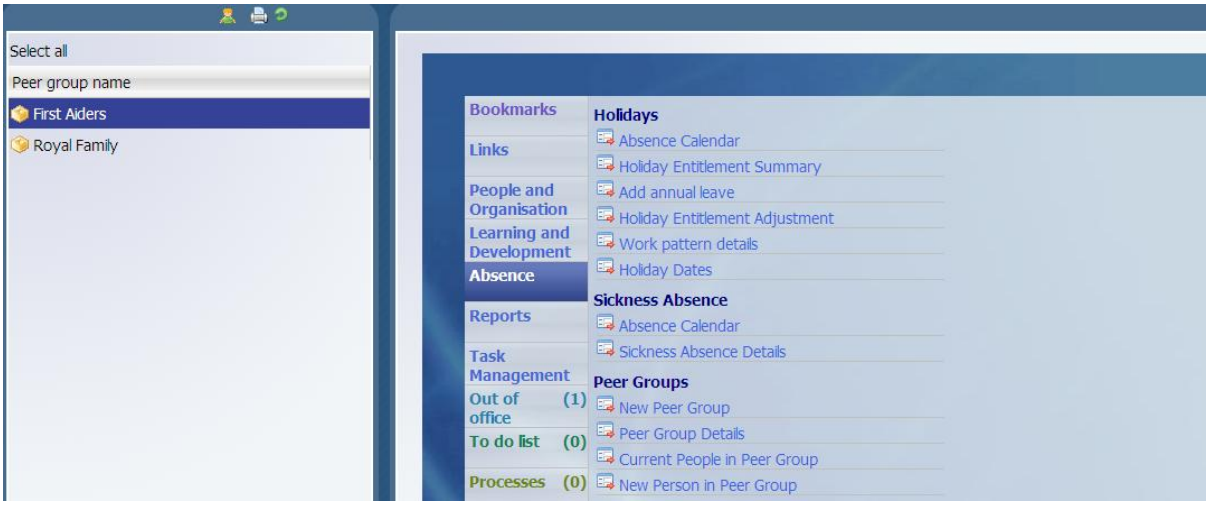
Peer Groups

Creating New Peer groups

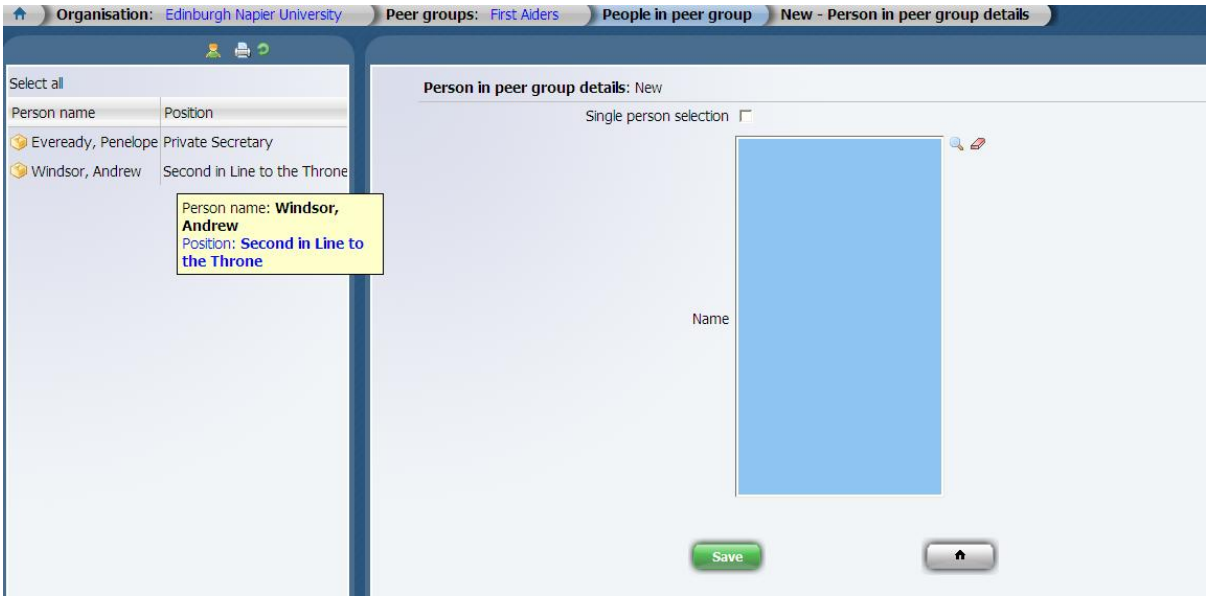
To set up a new peer group, select new Peer Group within the Absence Folder.

Enter Peer Group name – this will be seen by the members of the Peer Group
Click Save

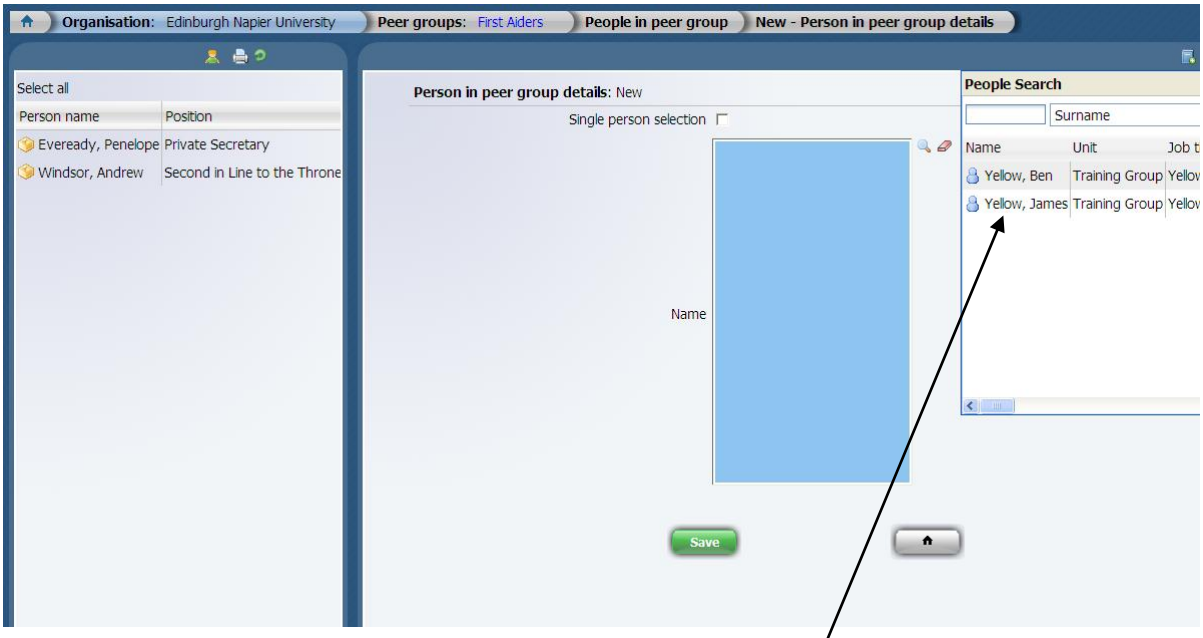
Select Peer Group name in the Object panel
Select New People in Peer Group in the Display panel



The New person in peer group details screen comes up.



You can select people individually by ticking the single person selection box but it is easier to click on the magnifying glass and then select on the magnifying glass again.



This brings up the list off all your reports. You can select more than one person by clicking on each individual. When clicked their name will transfer into the blue box.

Click **Save**

NB – leavers leave a peer group automatically. However, when you have a new staff you will need to add them to any relevant peer group(s)

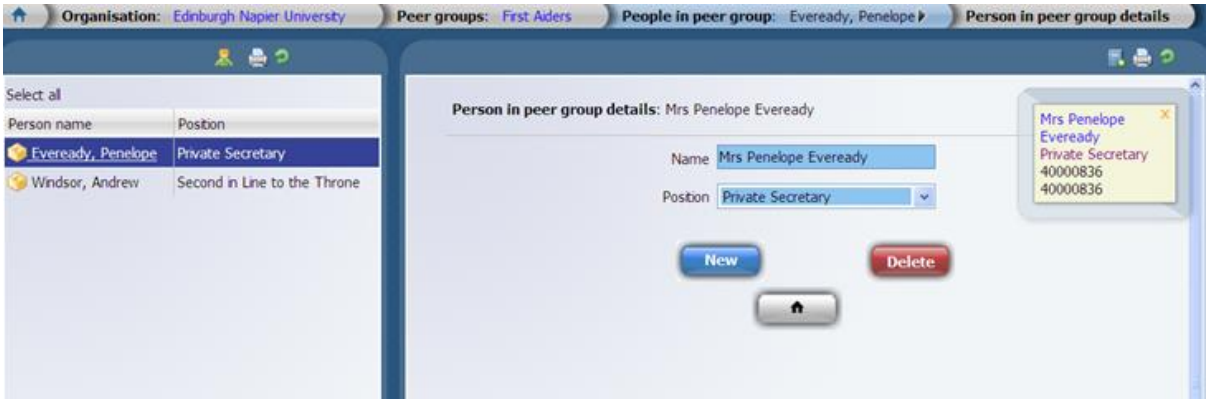
Peer Group Details

To view people in a Peer Group

Select Peer Group details

Select the Peer Group

The names of those in the peer group will be shown.

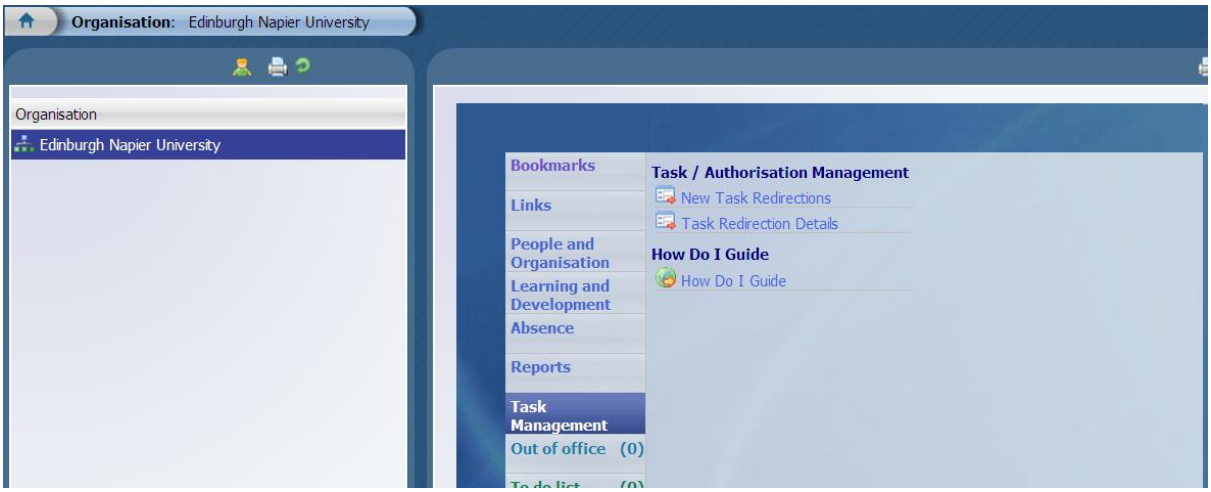


TASK MANAGEMENT

If you are going to be out of the University you can access HR Connect using VPN access.

Alternatively set up task redirection. This does not link with the out of office feature in Outlook Calendar. This must be done separately.

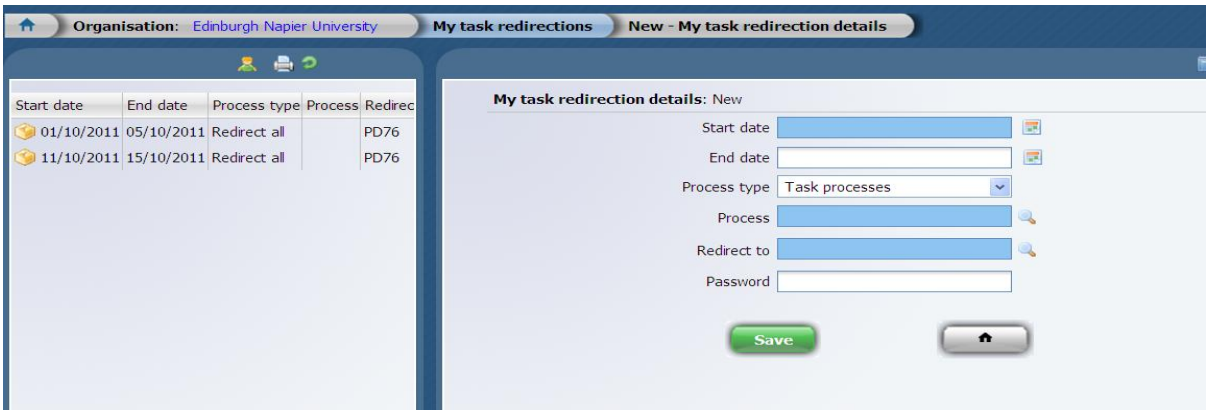
From Home Page
Click Task Management in the Display Panel



New Task Redirection

When a person with People Manager status is absent, you will need to consider re-assigning any tasks that they would normally process. You can re-direct tasks to other employees with People Manager Access. Prior to redirecting tasks you should discuss the redirection with your chosen delegate and inform your reportee's who will be approving requests in your absence. In order to select the correct delegate you should determine their User ID number. E.g. (pd23). If that person then is off they can also redirect tasks (to a maximum of nine individuals).

Select **New Task Redirection**



Enter the start date of the period you want to redirect your tasks

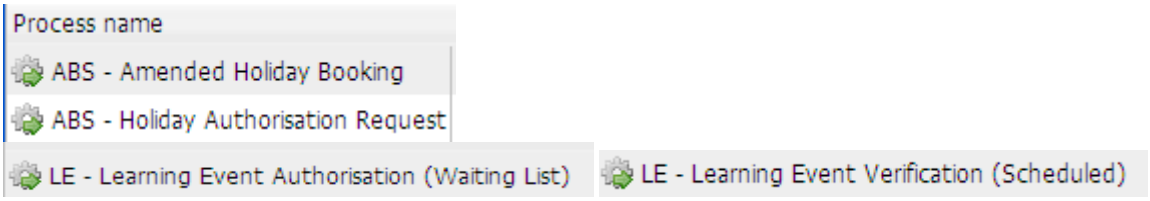
Enter the end date

Click the Process type drop-down menu

Select if you want to redirect all (redirects all workflows regardless of the type)

People (selects people related tasks)

Task processes (enable you to select individual tasks, below are the tasks that should be used)


Process name
ABS - Amended Holiday Booking
ABS - Holiday Authorisation Request
LE - Learning Event Authorisation (Waiting List)
LE - Learning Event Verification (Scheduled)

Task management will need to be considered if a reporting manager is long term sick or leaves their position. If necessary, the HR System team can redirect tasks. A task will only be redirected to someone more senior than the absent reporting manager.

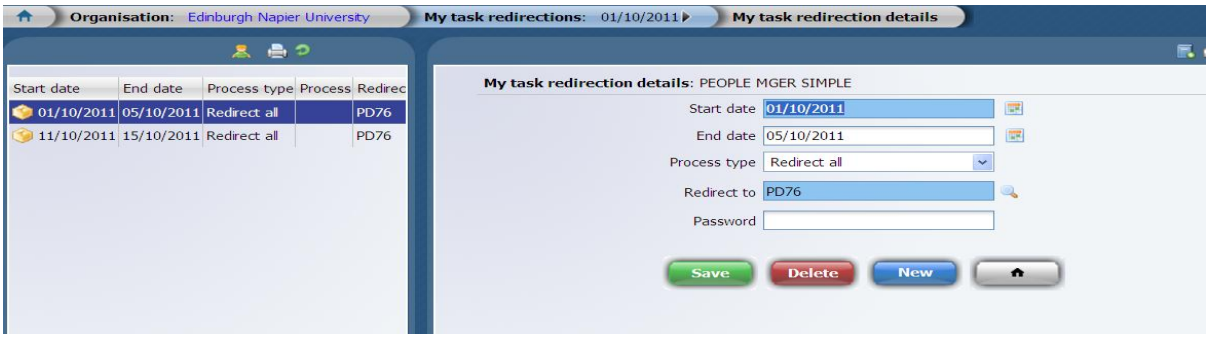
To select who to redirect to, click the magnifying glass icon. Input the User ID number of the person who will be authorising in your absence press enter or alternatively enter the surname & select from results

You will need to re-enter your password

When you have saved task redirections the details will be displayed on the Home page Message section when you click Home or next log on.

Task Redirection details

To view any task redirections set up in the system click on Task Redirection details.



This function can also be used to Delete a redirection if required

REPORTS

When a user logs into HR Connect as a People Manager they only have access to details for their reportees.

Reports within the standard Management Information menu option contain internal checks to ensure that only data from the managers' reportees is displayed.

Learning reports are not subject to security and therefore these reports types are not available via people manager. Learning reports will be built using Business Objects instead and available on request.

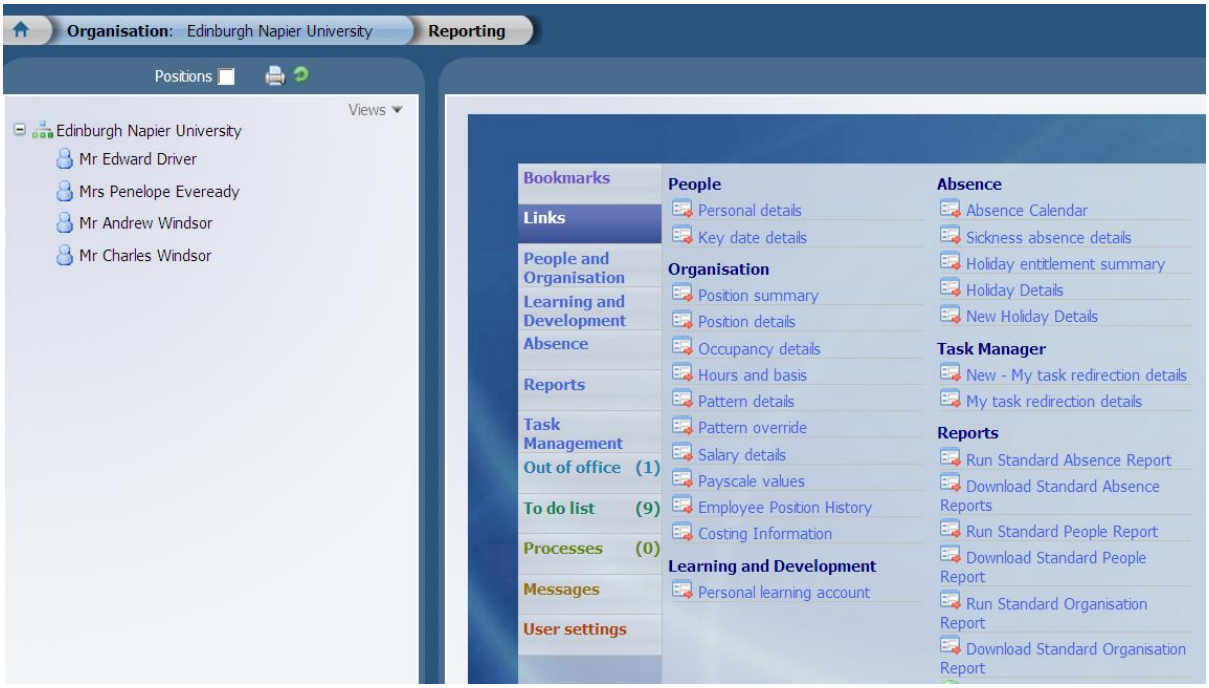
Available Reports

Leavers
New Starts
Headcount Analysis
Movement Analysis
Absence Frequency
Absence History
Absence History – People
Absence Summary
Absence Tolerances
Friday Monday Absences
Holiday Entitlement Breakdown
Outstanding Holiday Entitlement

Running Reports

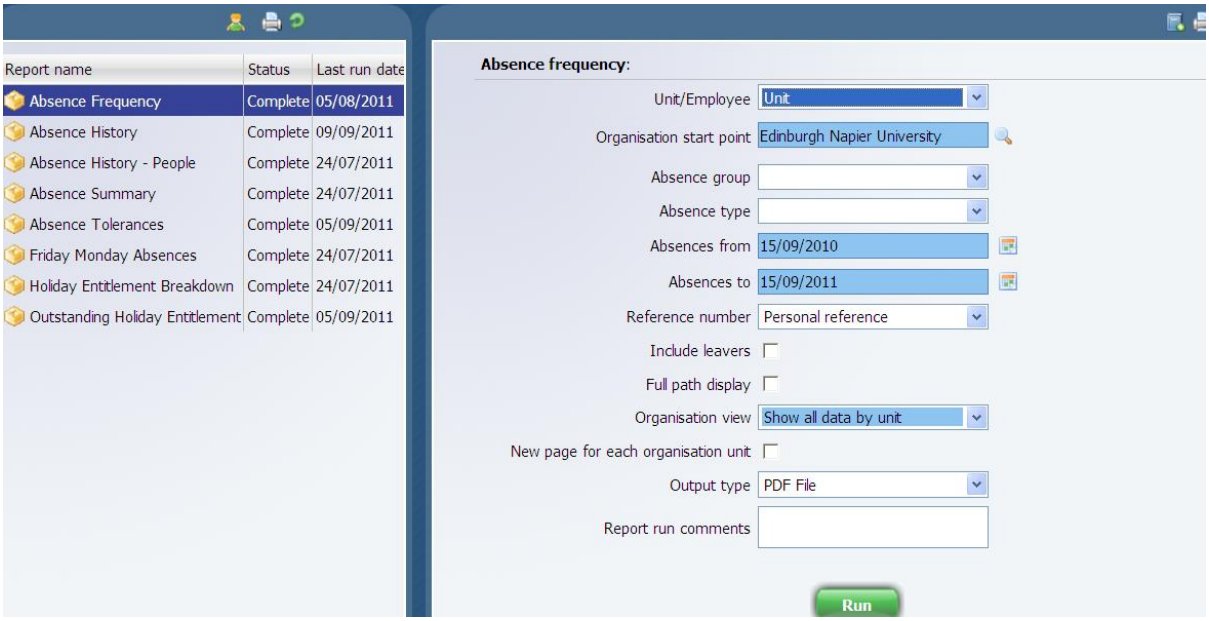
The process of running and downloading standard reports is the same for each report. In this example we are running and Absence report

From Home Page
Click **Run standard absence report**

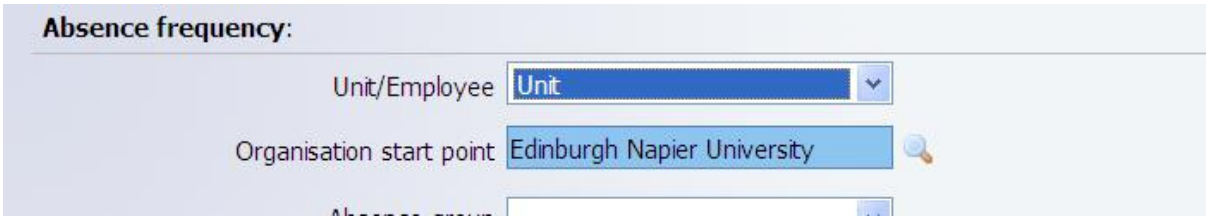


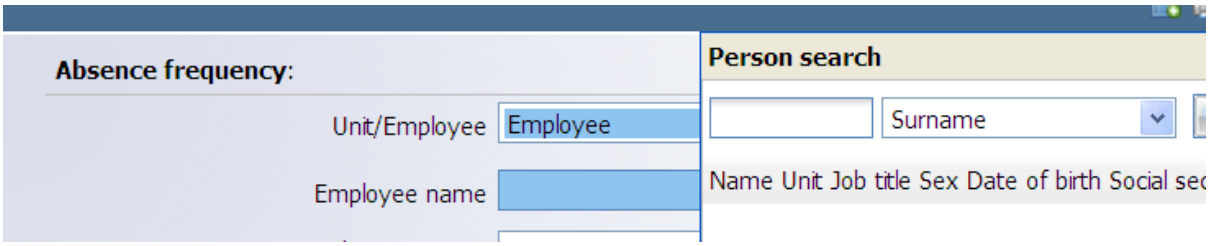
The list of available Absence reports is shown in the Object panel

Select required report e.g. Absence Frequency report
Absence Frequency report screen is shown in the Display panel

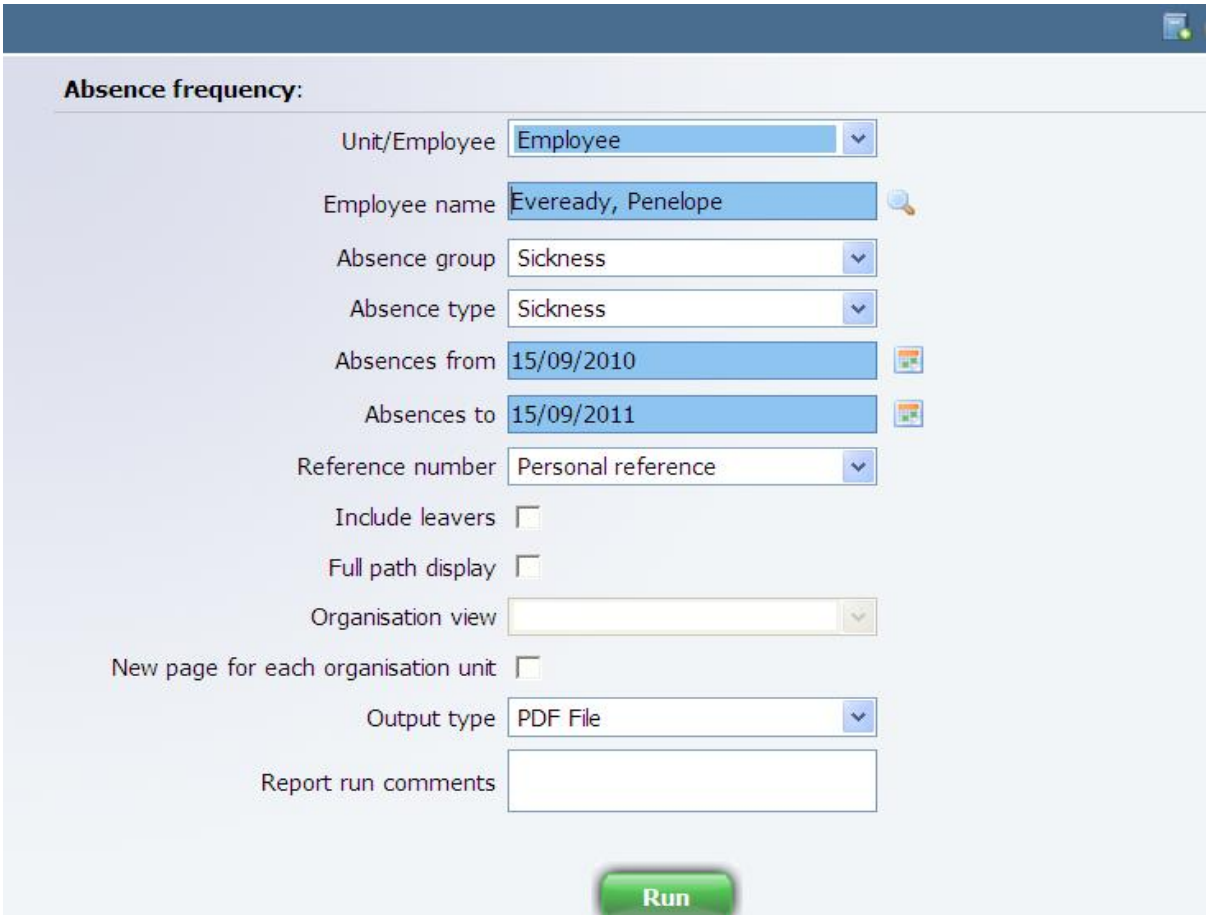


Select **Unit/ Employee**
You can then search for unit name or employee name

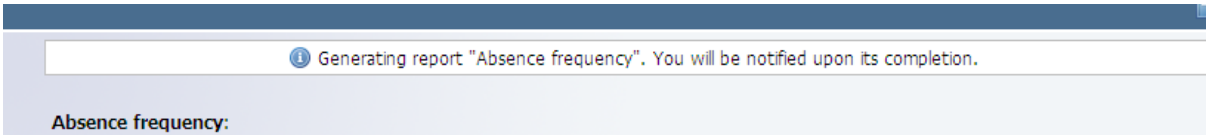




Enter Absence group
Enter absence type
Press **Run**

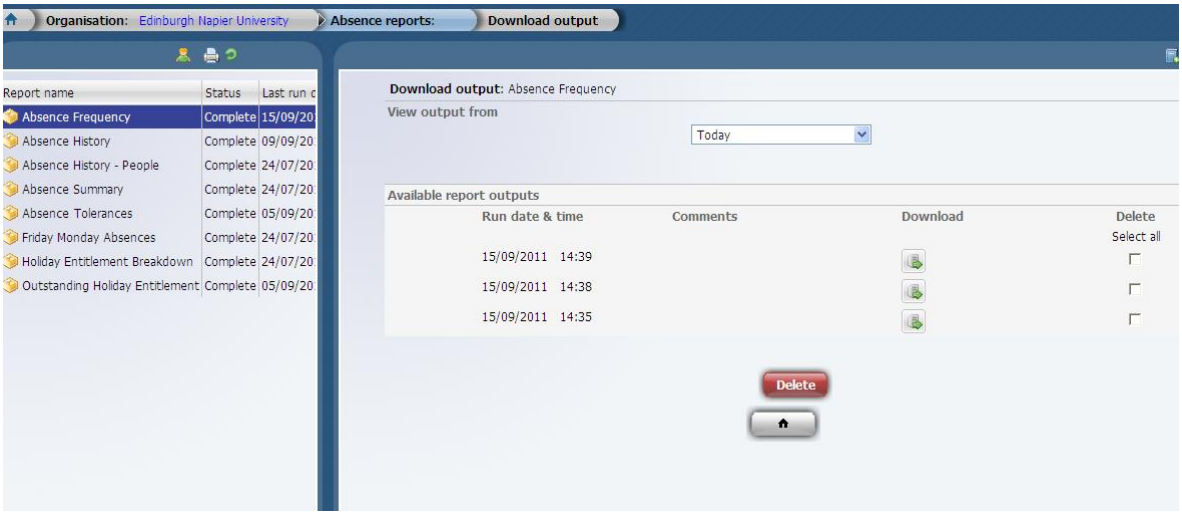


You will be notified that the report is being generated

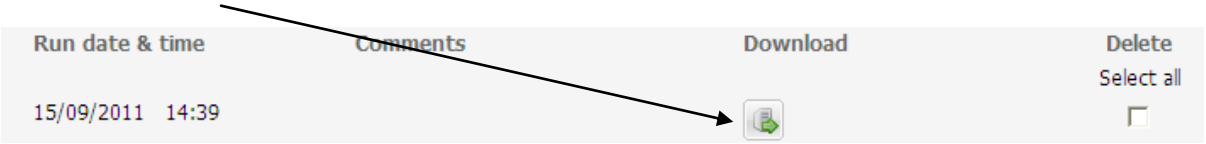


Once complete you will see a pop up in the bottom right corner saying Report complete

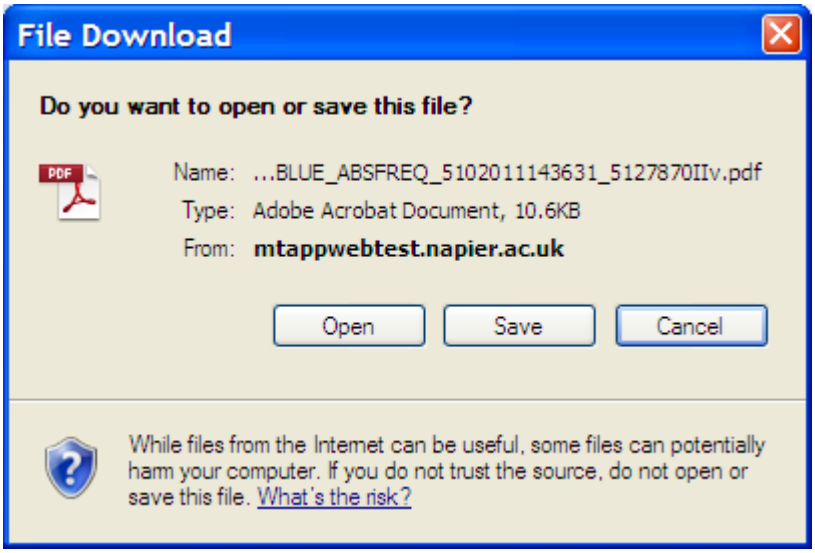
Click on the report complete and you will come to Download report screen



Select **Download** button



Option to open or save report


File Download
Do you want to open or save this file?
Name: ...BLUE_ABSFREQ_5102011143631_5127870IIv.pdf
Type: Adobe Acrobat Document, 10.6KB
From: mtappwebtest.napier.ac.uk
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Click **Open**

Report available to view

MIDLANDHR

Edinburgh Napier University

Absence Frequency

3 Pages
Run Date: Thursday 15 September 2011
Run Time: 14:39:22
Run by: PEOPLE MGER SIMPLE

Parameters

Absences From:	15/09/2010 To: 15/09/2011			Organisational Start Point:	Edinburgh Napier University
Absence Group:	Sickness			Organisation View:	Full
Absence Type:	Sickness	Include Leavers:	No	Employee Name:	Eveready Penelope

Trent

Edinburgh Napier University

Absence Frequency

Absences From:	05/10/2010 **To:** 05/10/2011			**Organisational Start Point:**	Edinburgh Napier University
Absence Group:	Sickness			**Organisation View:**	Full
Absence Type:	Sickness	**Include Leavers:**	No	**Employee Name:**	Blue Ben

Organisation Unit	Number of Absences	Days Lost	Hours Lost
Edinburgh Napier University/./Training Group			
Blue Ben (Blue Lecturer; Reference Number: 40004735)			
	1	1.00	7.00
Totals	**1**	**1.00**	**7.00**
Overall Totals	**1**	**1.00**	**7.00**

End of Report

Edinburgh Napier University

Absence Frequency

3 Pages
Run Date: Wednesday 05 October 2011
Run Time: 14:36:52
Run by: BOB BLUE

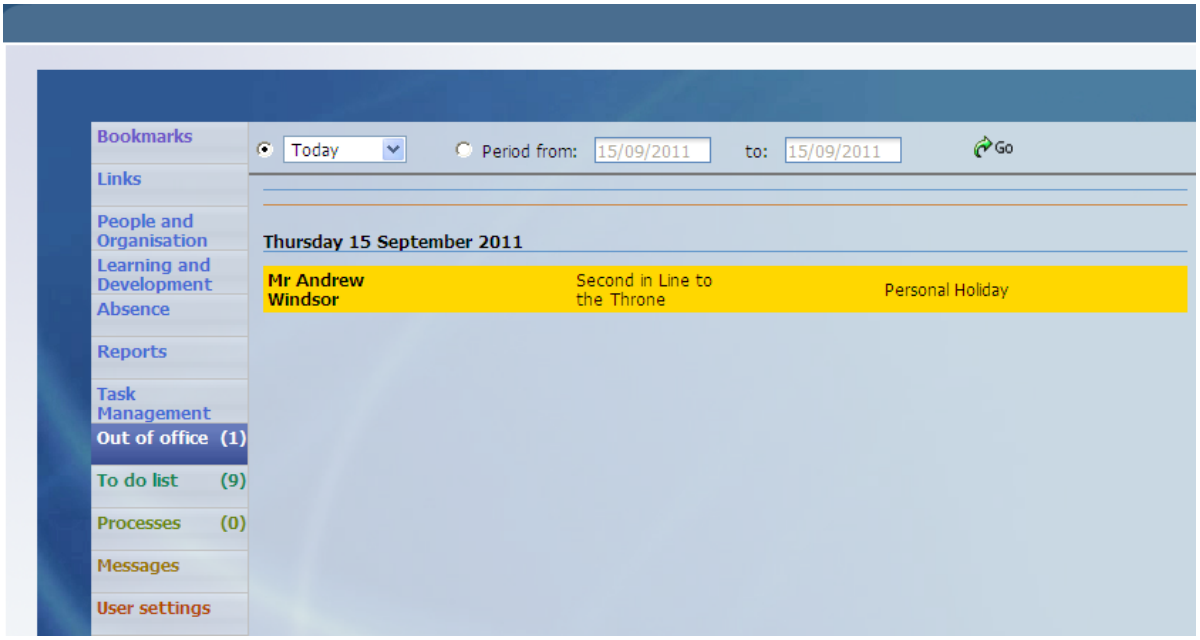
End of Report

Report name: AbsenceFrequency, version: 1.22

OUT OF OFFICE

From Home Page Click **Out of Office** in the Display Panel

This section will list all of the people from your reportees who have been identified to HR Connect, as being out of office. The screen always defaults to Today.



People are identified as being out of office by having an Absence e.g. holiday, sickness or maternity leave recorded in HR Connect, or by being scheduled on an internal Learning event.

Absences are displayed in day of the week order and are colour coded to indicate the type of absence. The colours used are those shown on the Absence calendar. Each absence lists the name of the person, their position and the type of absence.

You can modify the display using the controls at the top of the page. The drop down list enables you to select Today, Tomorrow, This week and Next week.

Alternatively you can select to display a specific date rage using the Period from and to date fields. If you change the selection you should then click the Go icon to have the data displayed.

Each row displayed is also a hyperlink and when clicked will display the Absence calendar, containing the people in the same unit as the person selected.

Note that if you have a large number of reportees you are advised not to set the Out of Office page as your initial Home page view. The details for the people who are out of office can then be built in the background prior to when you might need to access the page.

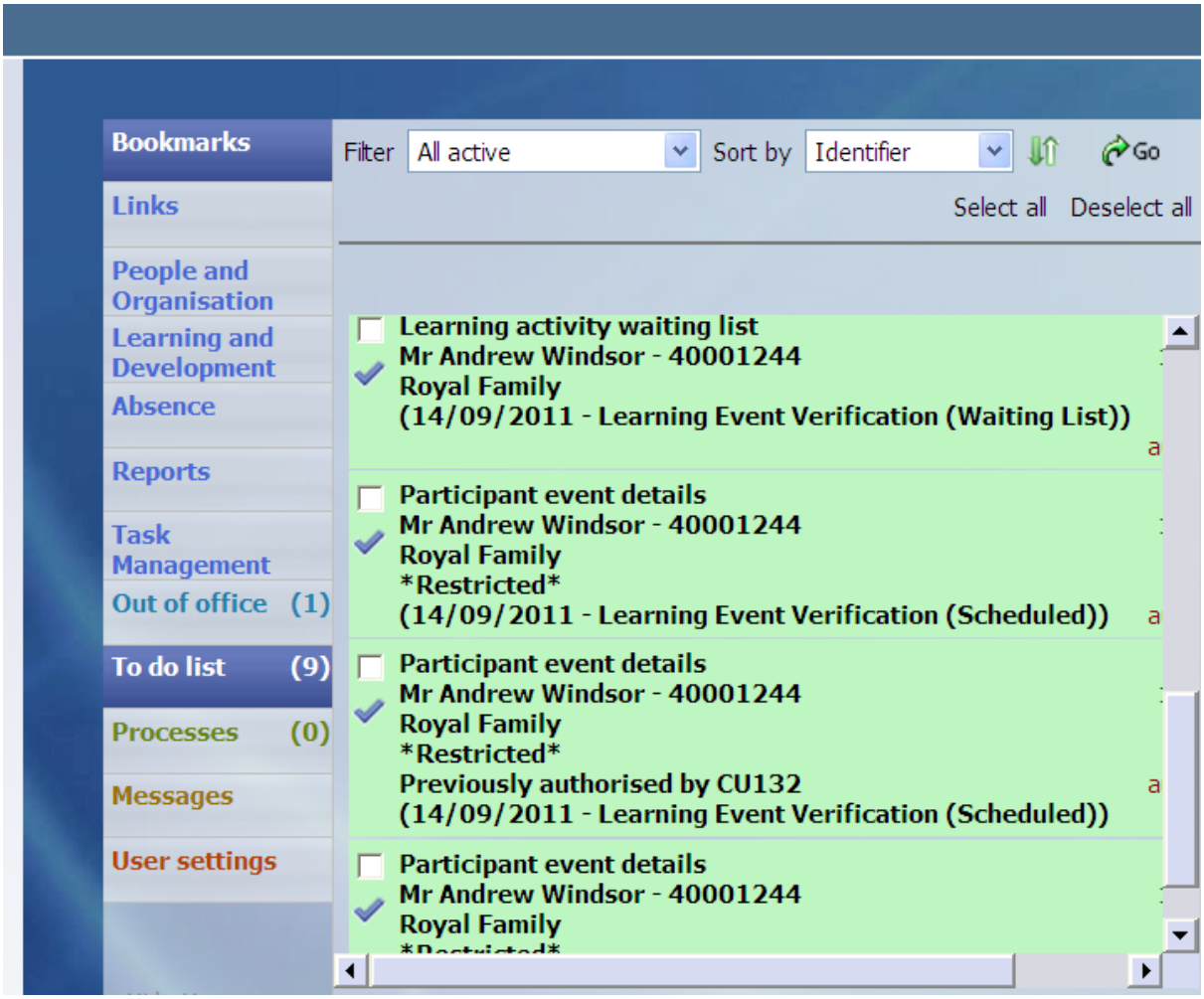
You can set the number of levels you wish to see “out of office” in your user settings.

TO DO LIST

On your initial log in to People Manager your **To-do list** will appear by default. This Default setting can be amended in the User preferences screen).

This shows any tasks which require authorisation. If you have deleted an email notification but not authorised the task the task itself will remain on this list.

Should authorisation not take place within 3 days, a reminder will be sent and if not authorised then after a further 3 days an authorisation request will be sent to the manager of line manager



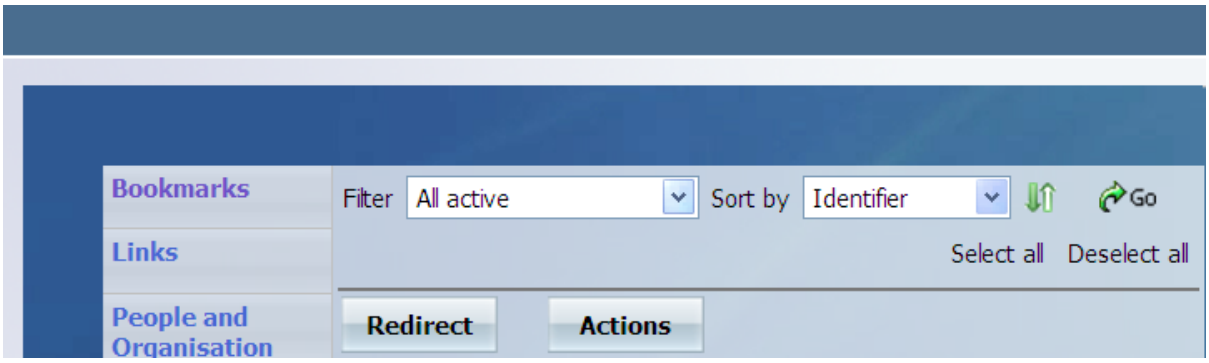
If there are no tasks this Display Panel will be blank.

The following is a summary of the authorisation process.

The colours of the tasks identify their type and priority:

- Green tasks require authorisation.
- Red tasks are Overdue tasks.

Next to each task there is a check box which when ticked will cause action buttons to be displayed (Redirect and Actions), that are relevant to the selected task. For example:



Action Tasks

If you tick a task and then click the Actions button will take you to the Authorise task page where you will have to enter your password to perform the action.

Redirect Tasks

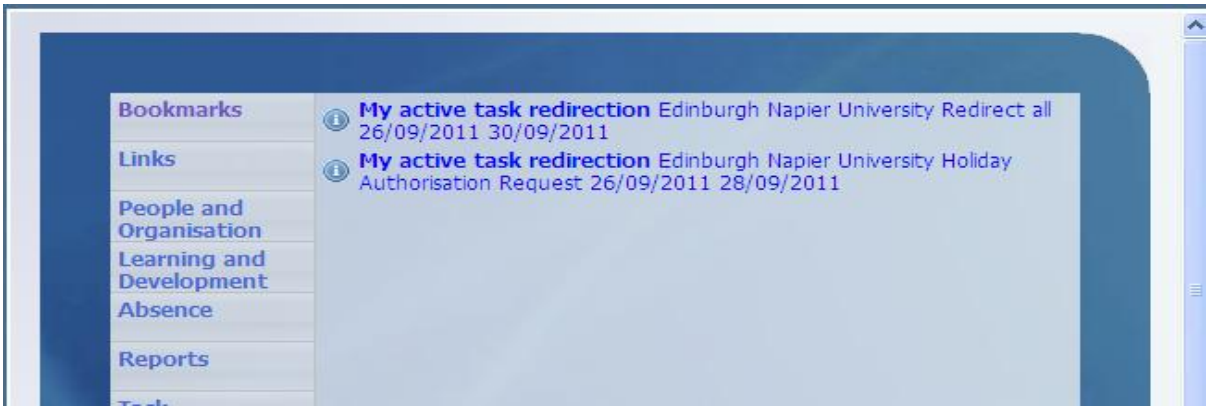
You can also redirect the selected task(s) by clicking the Redirect button or the redirect icon. If this button is clicked the Redirect task page is displayed allowing you to search for and select another recipient who will process the task. This process was covered in Task Management

PROCESSES

From Home Page
Click **Processes** in the Display Panel
This shows the status of processes that have run in the last 24 hours

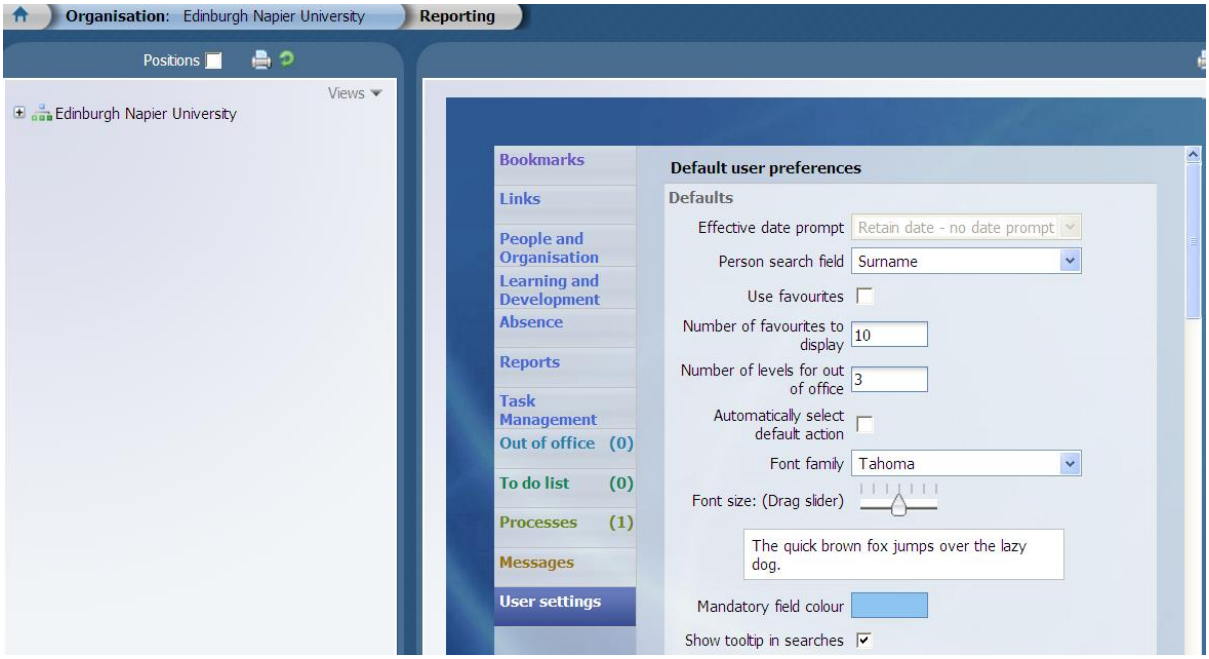
MESSAGES

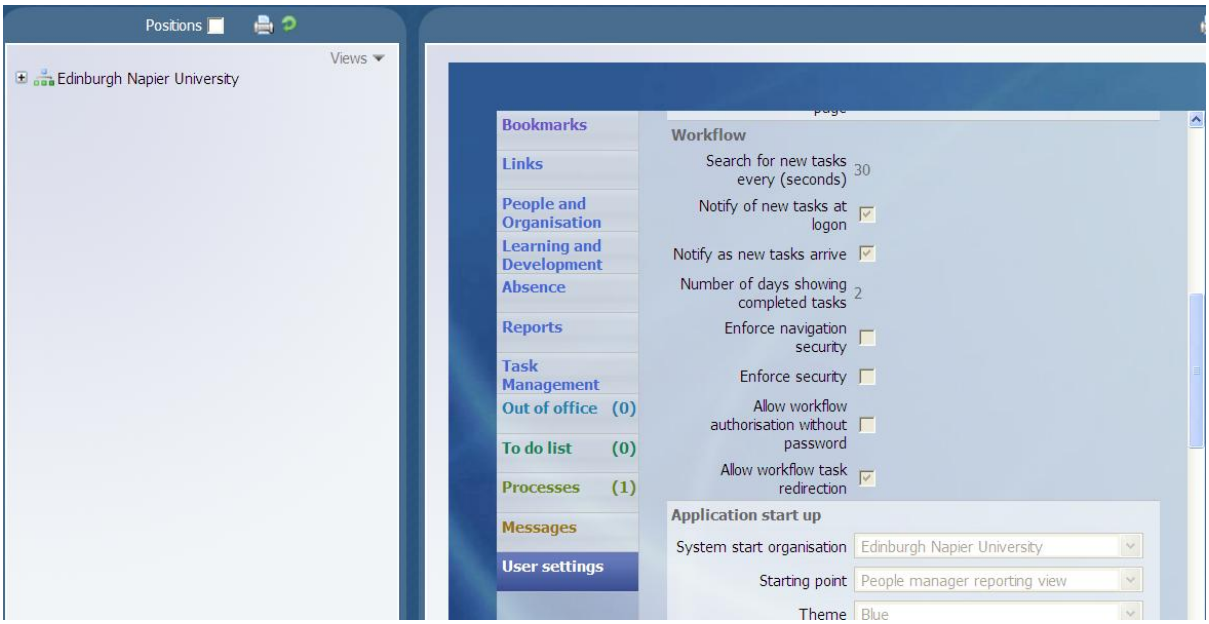
From Home Page
Click **Messages** in the Display Panel
This shows any messages of the day

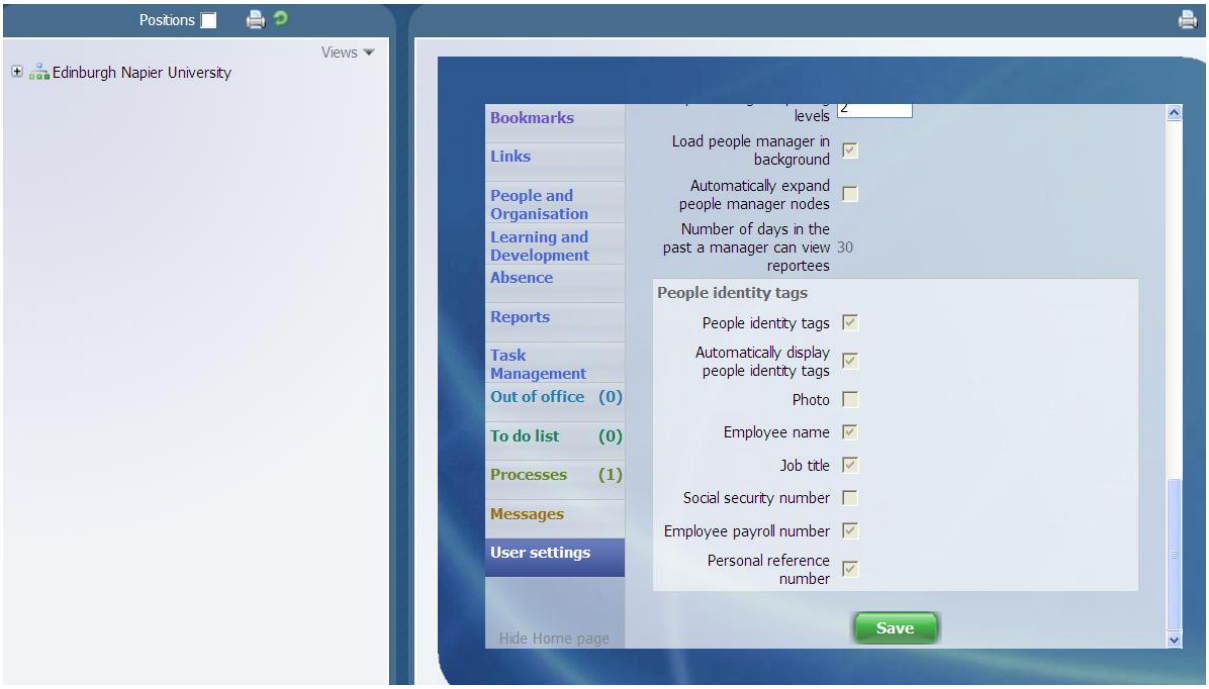

Bookmarks
Links
People and Organisation
Learning and Development
Absence
Reports
My active task redirection Edinburgh Napier University Redirect all 26/09/2011 30/09/2011
My active task redirection Edinburgh Napier University Holiday Authorisation Request 26/09/2011 28/09/2011

USER SETTINGS

You can change some settings to your personal preferred look and feel by adjusting the User settings. Where the field is greyed out, you cannot change the default setting. To change the default settings, tick the check box and then click save.







WORKFLOW

Workflow tasks rely on knowing who an employee's reporting manager is. Workflow can automatically pick the appropriate reporting manager from the organisation structure. Alternatively you can specify other appropriate people to perform reporting manager duties.

All tasks assigned to the Reporting Manager will be automatically posted to the occupant of the reporting position. The reporting Manager is listed in Position details screen.

There are two processes initially available, which are described in further detail later in the document.

1. Authorising Holiday/ Annual Leave process
2. Authorising Learning and Development process

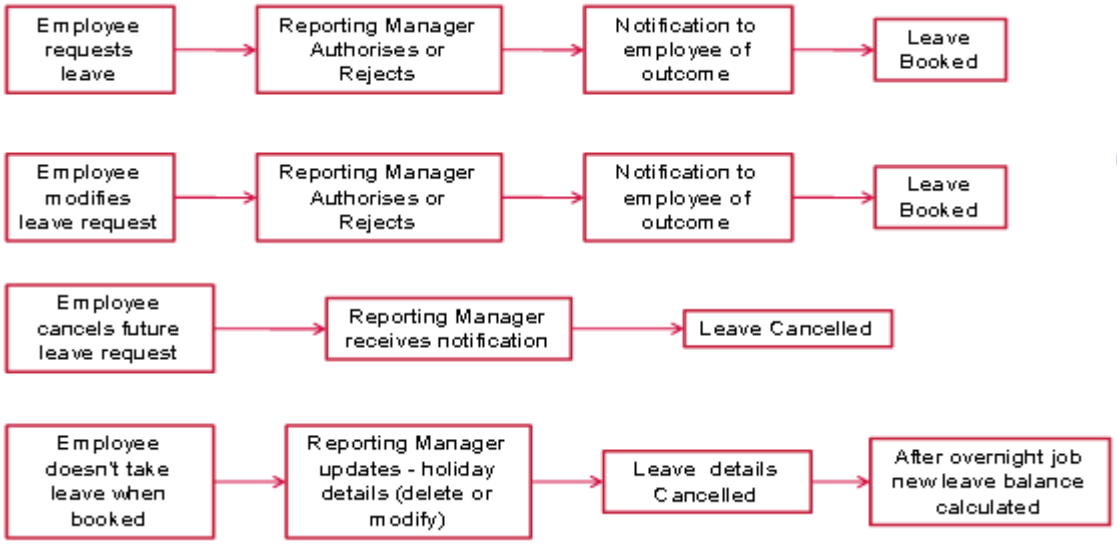
AUTHORISATION PROCESSES

There are two routes for a reporting manager to authorise request for holiday or learning event:

1. Email notification
2. To-do List

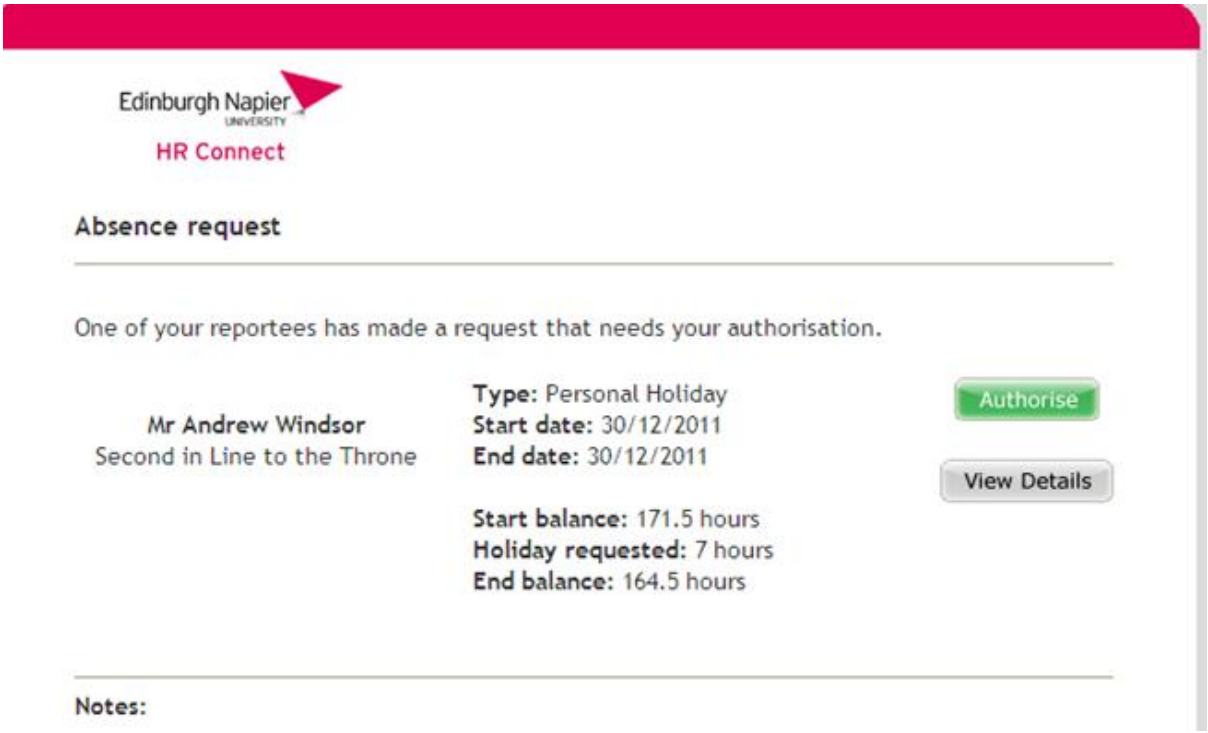
HOLIDAY LEAVE

The Holiday Leave process is detailed in the map below.


Employee requests leave
Reporting Manager Authorises or Rejects
Notification to employee of outcome
Leave Booked
Employee modifies leave request
Reporting Manager Authorises or Rejects
Notification to employee of outcome
Leave Booked
Employee cancels future leave request
Reporting Manager receives notification
Leave Cancelled
Employee doesn't take leave when booked
Reporting Manager updates - holiday details (delete or modify)
Leave details Cancelled
After overnight job new leave balance calculated

Holiday Leave Authorisation - Email notification

When a requested is submitted by an employee who directly reports to you, through Employee Self service you will receive an absence request email:



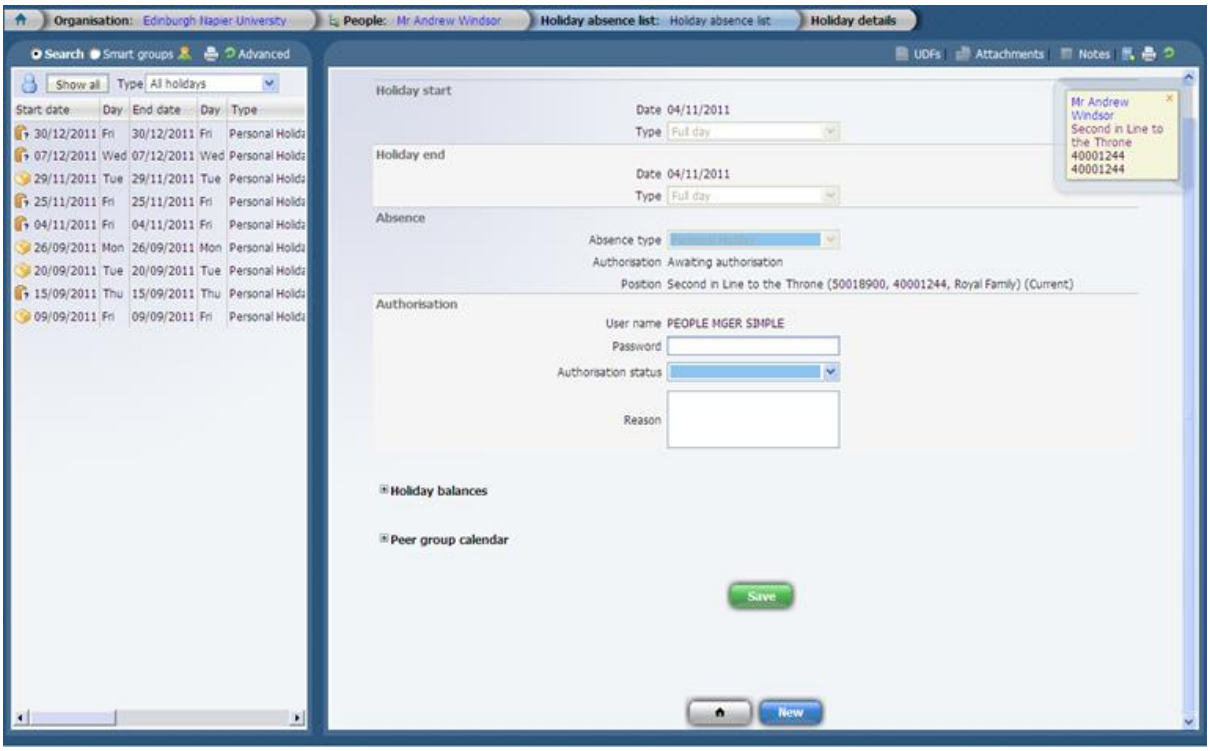
To approve the request, click on the **'Authorise'** button. This will prompt you to enter your username and password. This will automatically authorise the holiday straight from the email. You will not be able to view the absence calendar or comment on the request.

To view more information about the absence, view the peer calendar or look at the holiday balance for the employee or to reject the request click on the 'View details' button

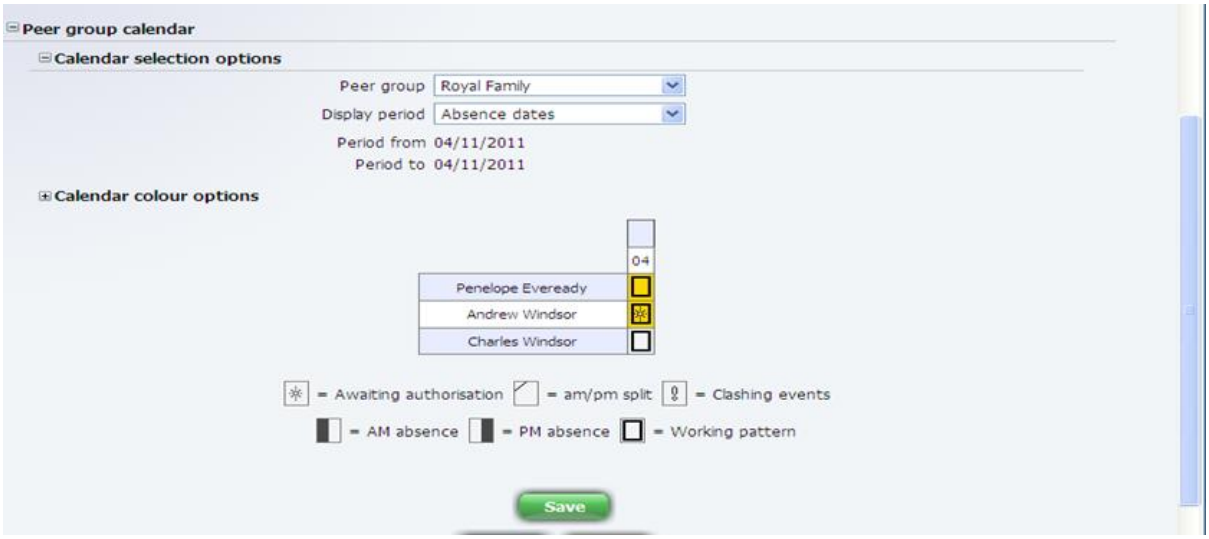
Clicking on the link within the email will bring up the log – in screen

Enter your University **User name and Password.** (This is your University network password)

Once this is entered it will bring you directly to the **Holiday Details** screen.



To view the person's current **Holiday balance**, or **Peer Group calendar** (if required) expand the screen by clicking on the + box.

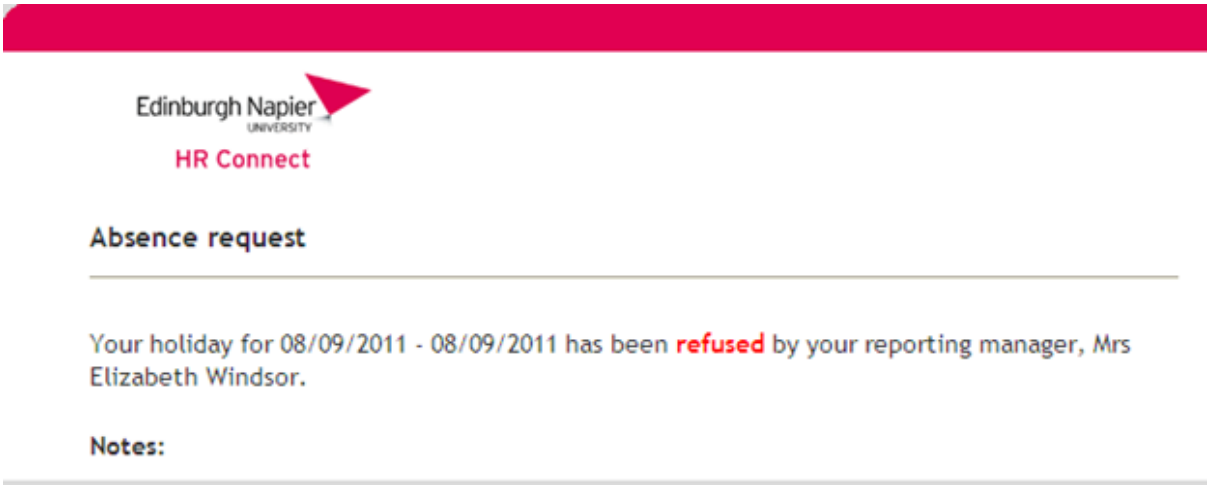


To authorise, enter your password

Select the correct Authorisation status from the drop down menu.

Add reason or comment which will be included in the notification email.

When you approve or reject a request, a notification email will automatically be sent to the member of staff who submitted the request to advise them of the decision.

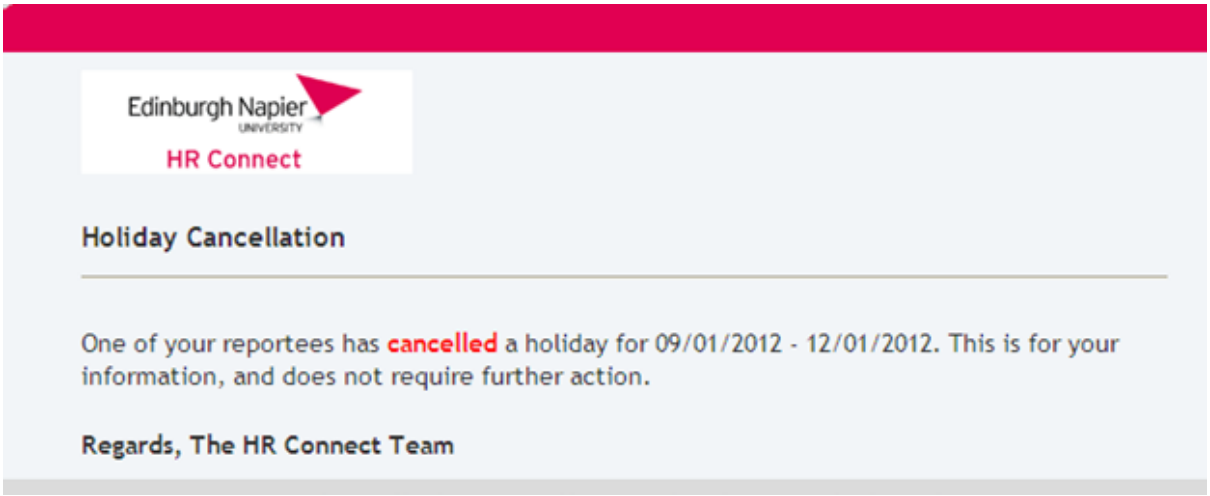

Edinburgh Napier UNIVERSITY
HR Connect
Absence request
Your holiday for 08/09/2011 - 08/09/2011 has been refused by your reporting manager, Mrs Elizabeth Windsor.
Notes:

Edinburgh Napier UNIVERSITY
HR Connect
Absence request
Your holiday for 09/09/2011 - 09/09/2011 has been authorised by your reporting manager, Mrs Elizabeth Windsor.
Notes:

If the employee changes the dates of their request, you will receive a new email and you should follow the process above. New email notifications will occur and supersede the original email.

Please note that this new email will supersede any previous emails (the links in any earlier emails will no longer work)

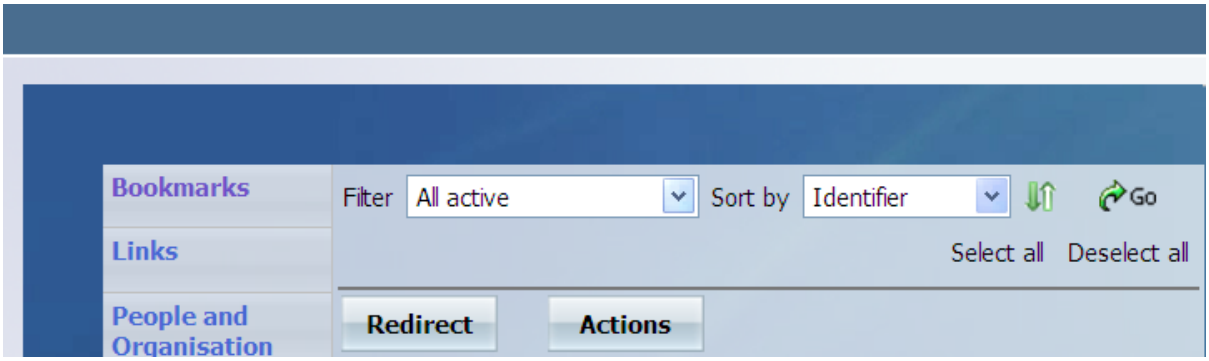
If the employee cancels their request you will receive a notification email. No further action is required.

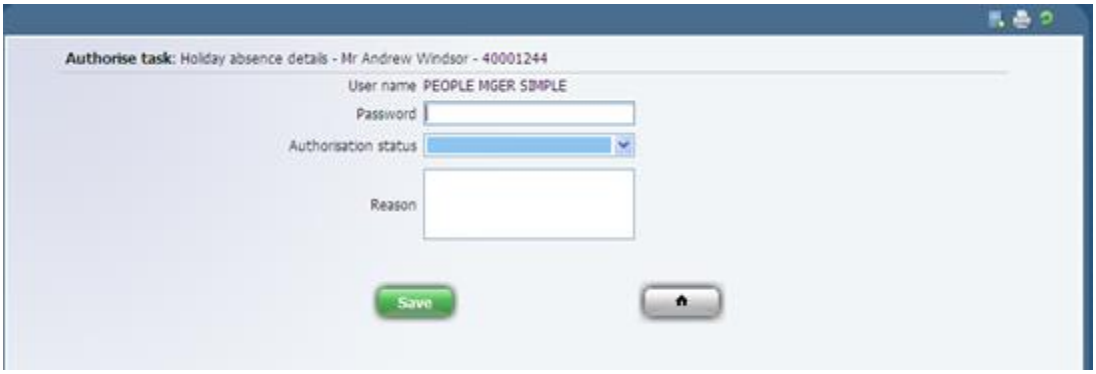

Edinburgh Napier UNIVERSITY
HR Connect
Holiday Cancellation
One of your reportees has cancelled a holiday for 09/01/2012 - 12/01/2012. This is for your information, and does not require further action.
Regards, The HR Connect Team

Holiday Leave Authorisation - To do list

If you have holidays to authorise they will be shown in the central panel.

Click the **Actions** button and you will come to the Authorise task – Holiday Absence details screen





Type in your **Password** (this is your University network password)
To process a holiday request, select the **Authorisation Status** drop down menu and select authorised, not authorised or on hold.
You can add a **Reason** for your decision or a comment e.g. Sorry, there are too many people off at that time or Enjoy your holiday!

Authorising or rejecting a request will generate an automatic notification email to the member of staff and the reason/ comment will be communicated in the automatic response email to the employee.

You will not be able to authorise Flexi-leave requests through HR Connect, although this is a potential development. However HR Connect is not a Time & Attendance system and so employees will still need to complete the Flexi-leave Excel spreadsheets, and this should be checked by the line manager before approving a flexi-leave request.

LEARNING EVENTS

There are two processes for staff when they book a learning event through Employee Self Service.

If the learning activity is an Academic session run by Professional Development within the Office of the Vice Principal (Academic), the Line manager will receive an email notification but there will be no approval process.

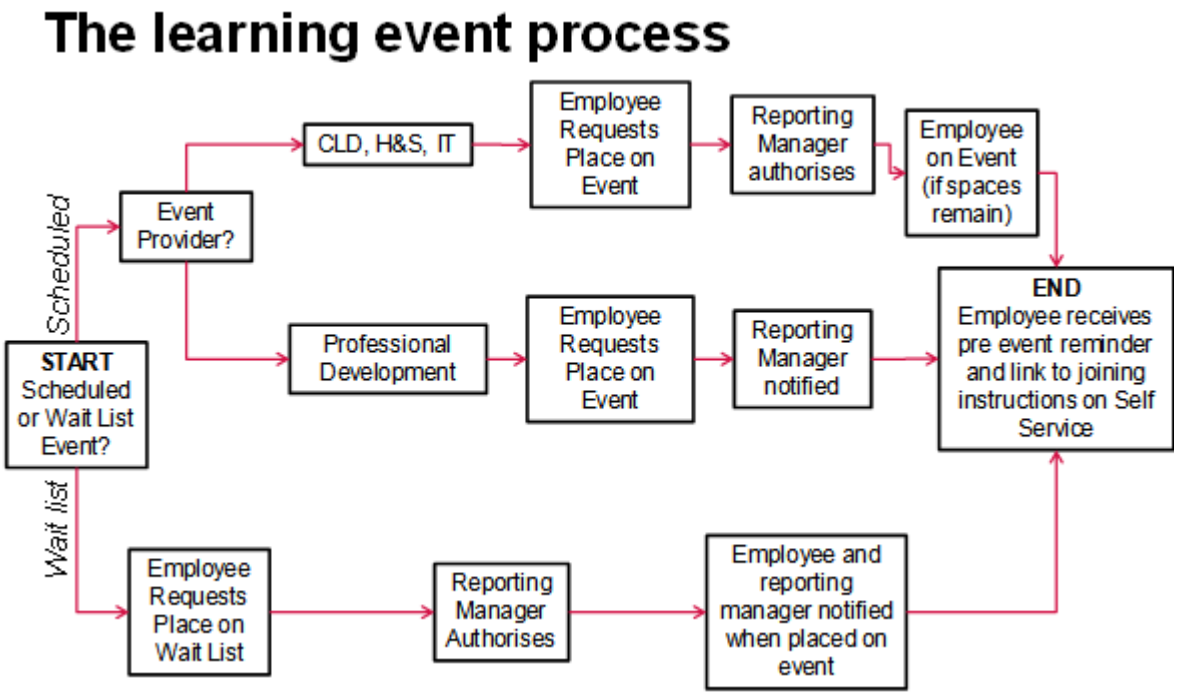
For all other learning activities run by Corporate Learning & Development, Information Services or Health & safety, there is an approval process.

Based up on the event types we have the following events would require authorisation or would be automatically authorised.

Activity Type	**Authorisation Y/N**
Academic Professional Development	Automatically Authorised
Administrative Skills	Requires Authorisation
Conference	Automatically Authorised
Edinburgh Napier Essentials	Requires Authorisation
Health & Safety skills	Requires Authorisation
I.T Skills	Requires Authorisation
Leadership & Management Development	Requires Authorisation
Leadership & Management Essentials	Requires Authorisation
Personal Effectiveness	Requires Authorisation
Research Development	Automatically Authorised
Research Skills	Automatically Authorised

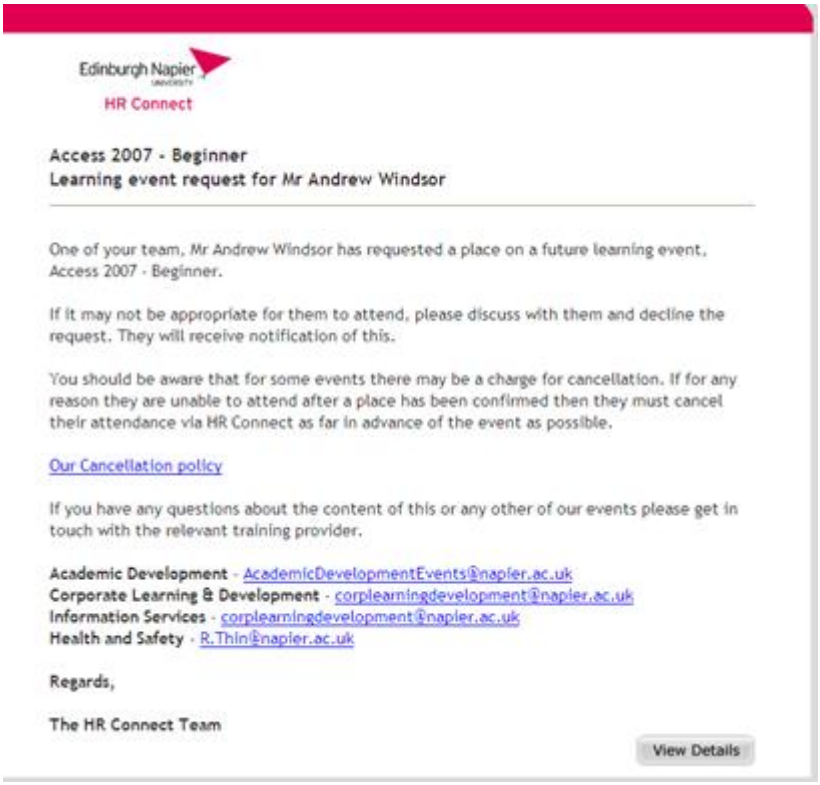
Some learning events have dates scheduled, whereas some events are only run when there are enough participants to run a session. Therefore some approval requests will, when authorised, move the employee directly onto the scheduled events or move the employee onto the waiting list. Employees approved on the waiting list will automatically included in the event once sufficient numbers have been reached and a confirmation email will be sent.

The process map below describes the route by which requests for learning events will move.


The learning event process
Scheduled
Wait list
START
Scheduled or Wait List Event?
Event Provider?
CLD, H&S, IT
Employee Requests Place on Event
Reporting Manager authorises
Employee on Event (if spaces remain)
Professional Development
Employee Requests Place on Event
Reporting Manager notified
END
Employee receives pre event reminder and link to joining instructions on Self Service
Employee Requests Place on Wait List
Reporting Manager Authorises
Employee and reporting manager notified when placed on event

Line manager- Waiting List email notification

When a direct report makes a request to attend a future learning event through Employee Self Service, you will receive an email notification to alert you to the request. This will add their name to the waiting list.



Edinburgh Napier
HR Connect

Access 2007 - Beginner
Learning event request for Mr Andrew Windsor

One of your team, Mr Andrew Windsor has requested a place on a future learning event, Access 2007 - Beginner.

If it may not be appropriate for them to attend, please discuss with them and decline the request. They will receive notification of this.

You should be aware that for some events there may be a charge for cancellation. If for any reason they are unable to attend after a place has been confirmed then they must cancel their attendance via HR Connect as far in advance of the event as possible.

Our Cancellation policy

If you have any questions about the content of this or any other of our events please get in touch with the relevant training provider.

Academic Development - AcademicDevelopmentEvents@napier.ac.uk
Corporate Learning & Development - corplearningdevelopment@napier.ac.uk
Information Services - corplearningdevelopment@napier.ac.uk
Health and Safety - R.Thin@napier.ac.uk

Regards,

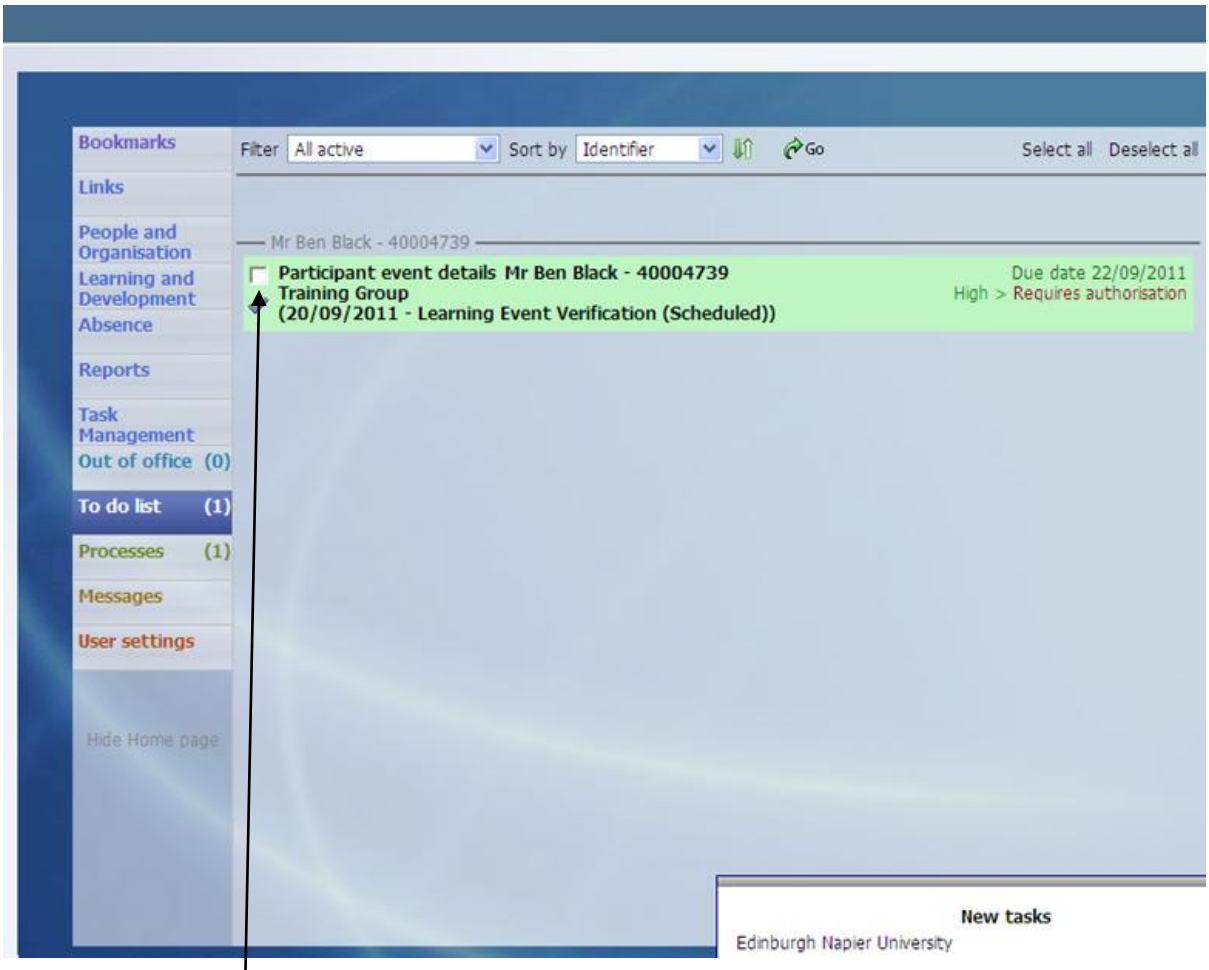
The HR Connect Team

View Details

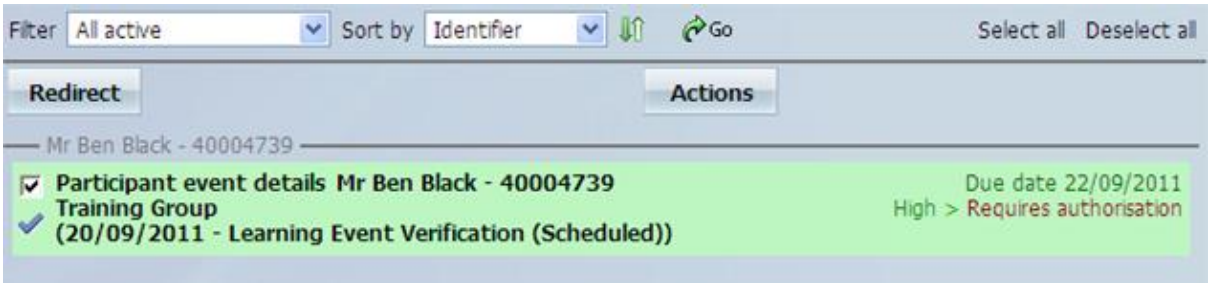
Clicking on the View Details link within the email will bring up the log – in screen

Enter your University **User name and Password.** (This is your University network password)

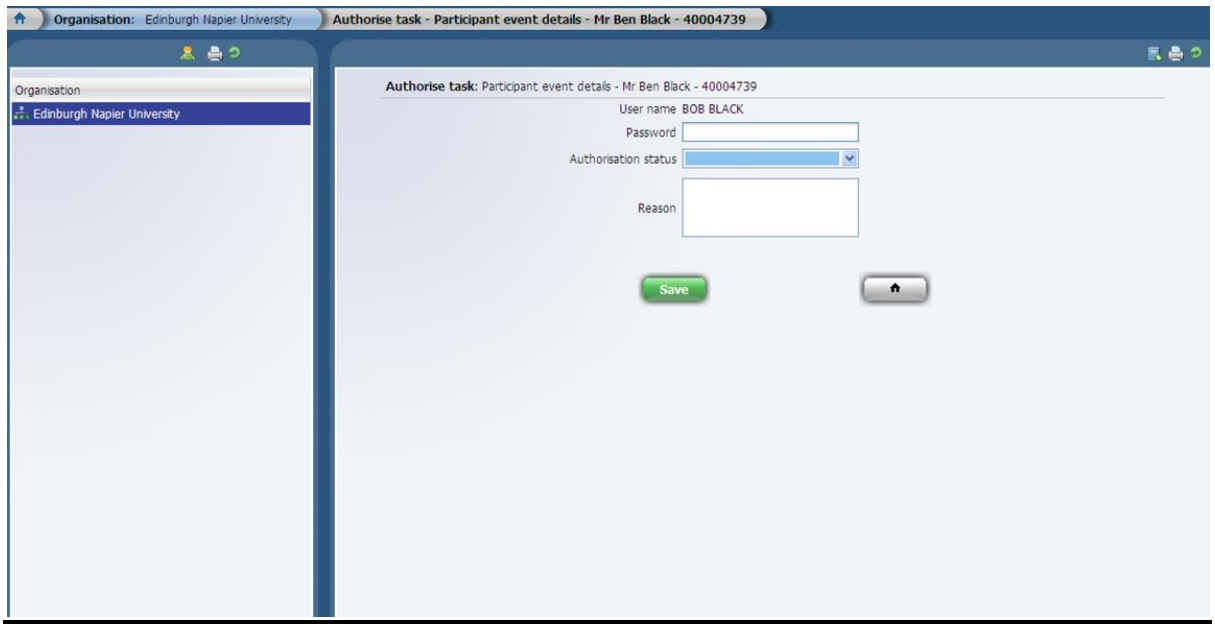
Once this is entered it will bring you directly to the Task List



Click on the Tick box next to the task.



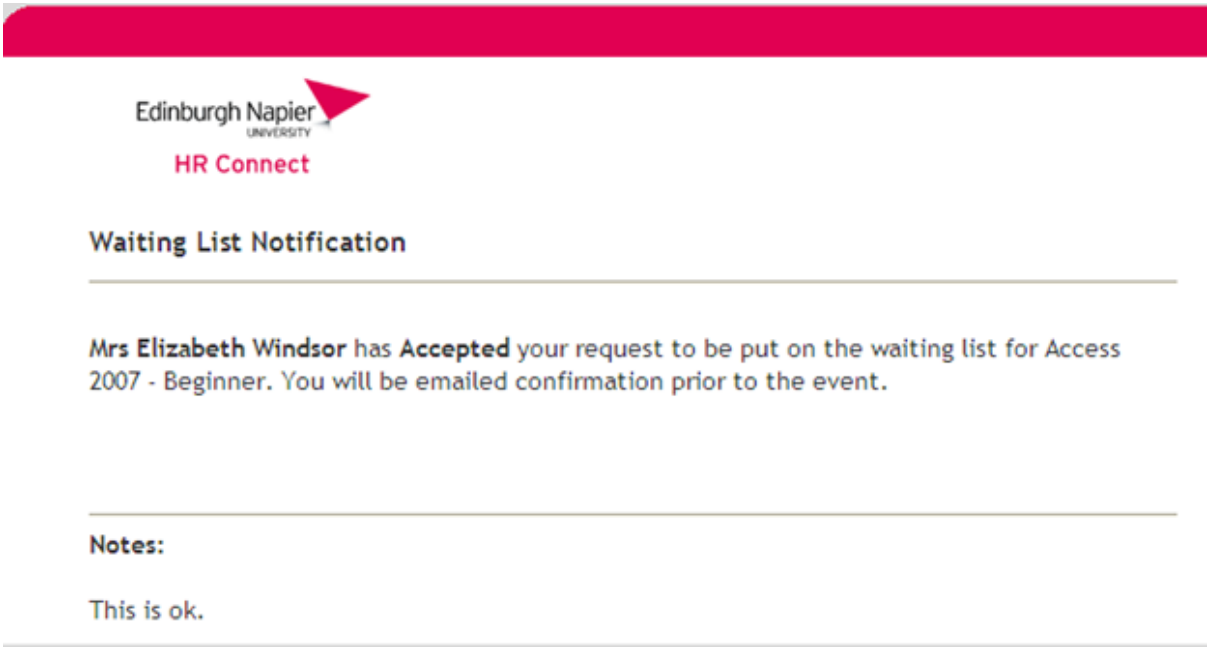
Click **Actions** and you will be brought to the Authorise tasks screen


Organisation: Edinburgh Napier University
Authorise task - Participant event details - Mr Ben Black - 40004739
Organisation
Edinburgh Napier University
Authorise task: Participant event details - Mr Ben Black - 40004739
User name BOB BLACK
Password
Authorisation status
Reason
Save

To authorise, enter your password
Select the correct Authorisation status from the drop down menu.
Add reason or comment which will be included in the notification email
Click Save.

When you approve or reject a request, a notification email will automatically be sent to the member of staff who submitted the request to advise them of the decision.

Employee Waiting list notifications



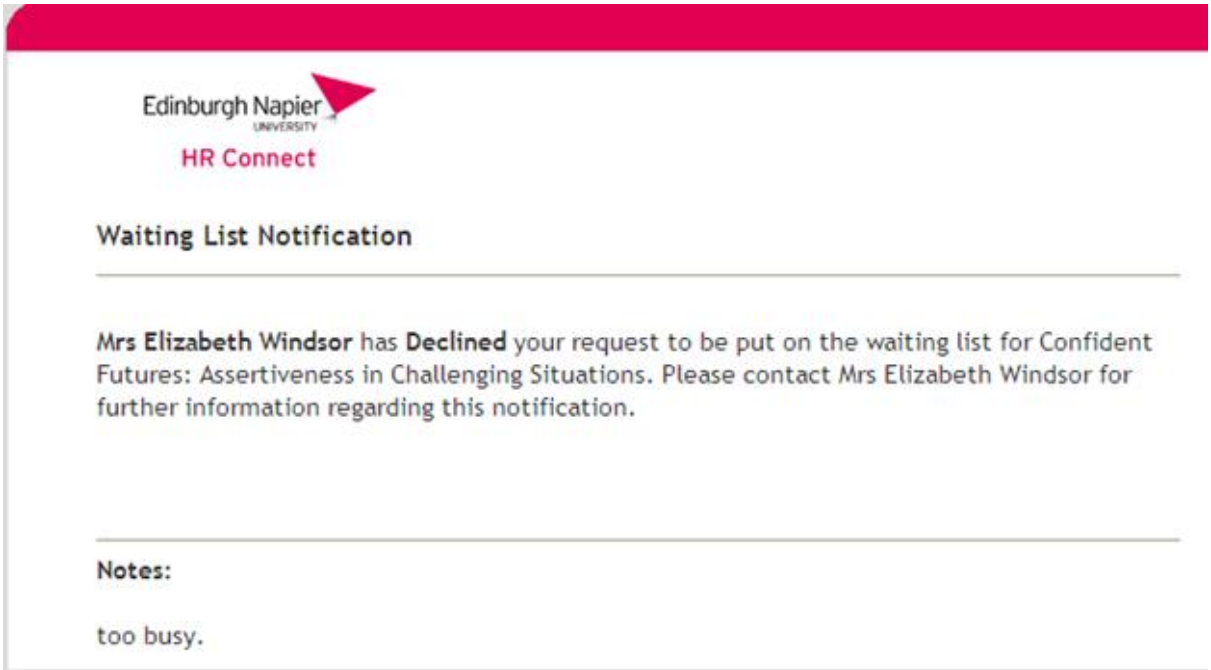
Edinburgh Napier UNIVERSITY
HR Connect

Waiting List Notification

Mrs Elizabeth Windsor has **Accepted** your request to be put on the waiting list for Access 2007 - Beginner. You will be emailed confirmation prior to the event.

Notes:

This is ok.



Edinburgh Napier UNIVERSITY
HR Connect

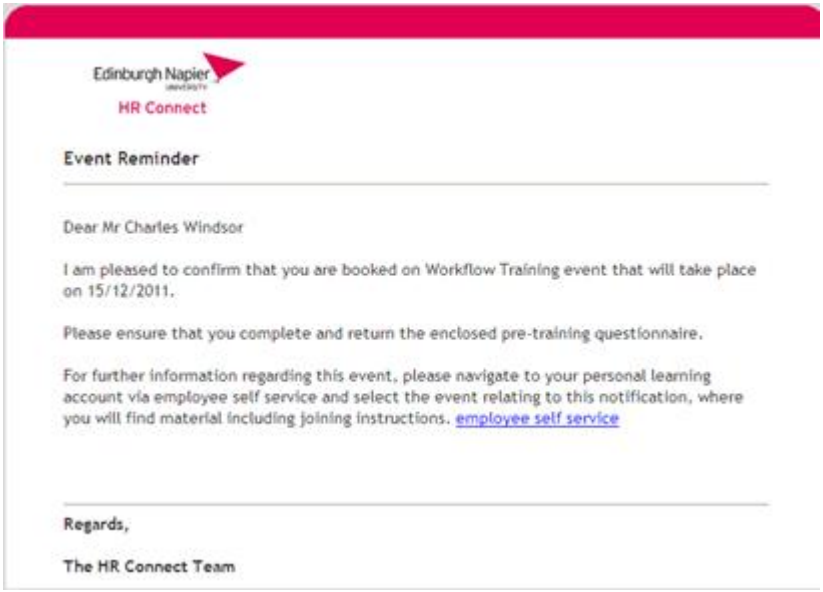
Waiting List Notification

Mrs Elizabeth Windsor has **Declined** your request to be put on the waiting list for Confident Futures: Assertiveness in Challenging Situations. Please contact Mrs Elizabeth Windsor for further information regarding this notification.

Notes:

too busy.

When the event is scheduled they will receive an email notifying them of the date and giving them joining instructions.



Edinburgh Napier
HR Connect

Event Reminder

Dear Mr Charles Windsor

I am pleased to confirm that you are booked on Workflow Training event that will take place on 15/12/2011.

Please ensure that you complete and return the enclosed pre-training questionnaire.

For further information regarding this event, please navigate to your personal learning account via employee self service and select the event relating to this notification, where you will find material including joining instructions. employee self service

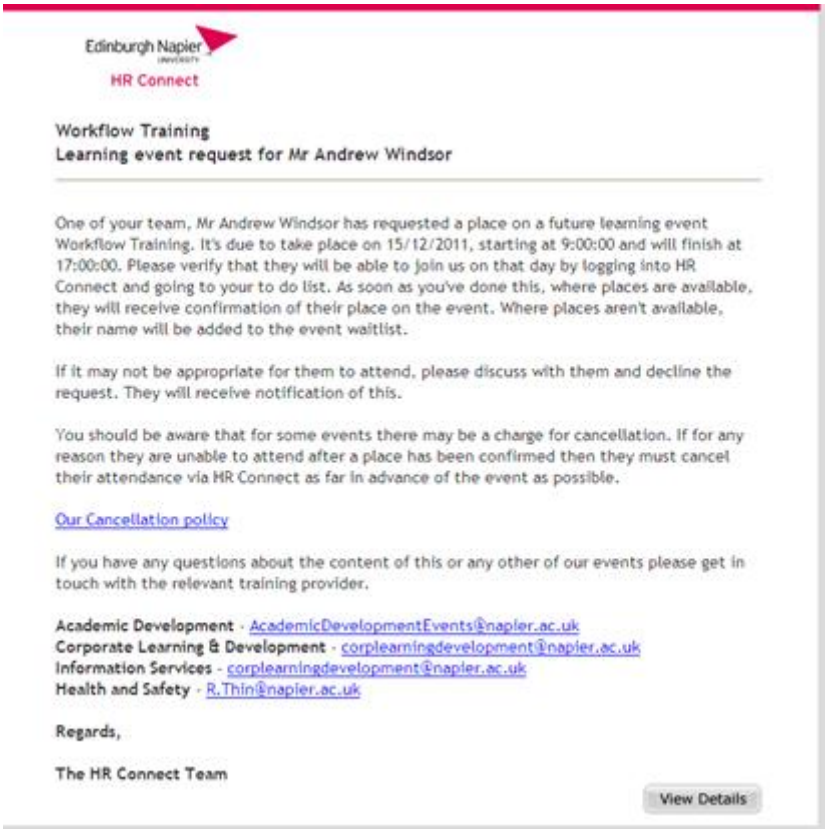
Regards,

The HR Connect Team

Line manager - Scheduled event notification

When a direct report makes a request to attend a scheduled learning event through Employee Self Service, you will receive an email notification to alert you to the request. This will tell you the date and time of the event.

Authorising this request will book the employee onto the event or, if there are no available spaces add their name to the waiting list for the next scheduled event.



Edinburgh Napier
HR Connect

Workflow Training
Learning event request for Mr Andrew Windsor

One of your team, Mr Andrew Windsor has requested a place on a future learning event Workflow Training. It's due to take place on 15/12/2011, starting at 9:00:00 and will finish at 17:00:00. Please verify that they will be able to join us on that day by logging into HR Connect and going to your to do list. As soon as you've done this, where places are available, they will receive confirmation of their place on the event. Where places aren't available, their name will be added to the event waitlist.

If it may not be appropriate for them to attend, please discuss with them and decline the request. They will receive notification of this.

You should be aware that for some events there may be a charge for cancellation. If for any reason they are unable to attend after a place has been confirmed then they must cancel their attendance via HR Connect as far in advance of the event as possible.

Our Cancellation policy

If you have any questions about the content of this or any other of our events please get in touch with the relevant training provider.

Academic Development - AcademicDevelopmentEvents@napier.ac.uk
Corporate Learning & Development - corplearningdevelopment@napier.ac.uk
Information Services - corplearningdevelopment@napier.ac.uk
Health and Safety - R.Thin@napier.ac.uk

Regards,

The HR Connect Team

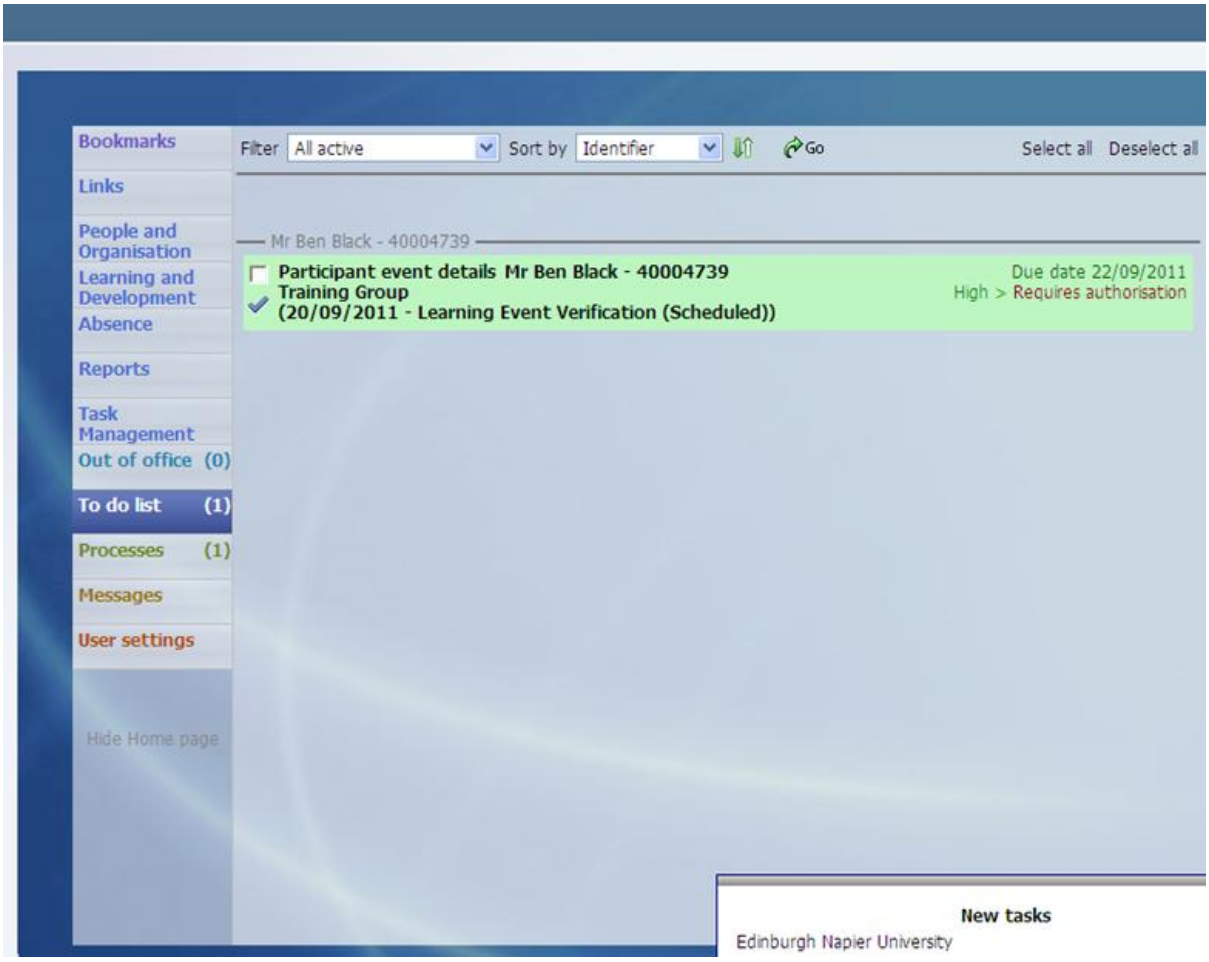
View Details

Request to be placed on scheduled event

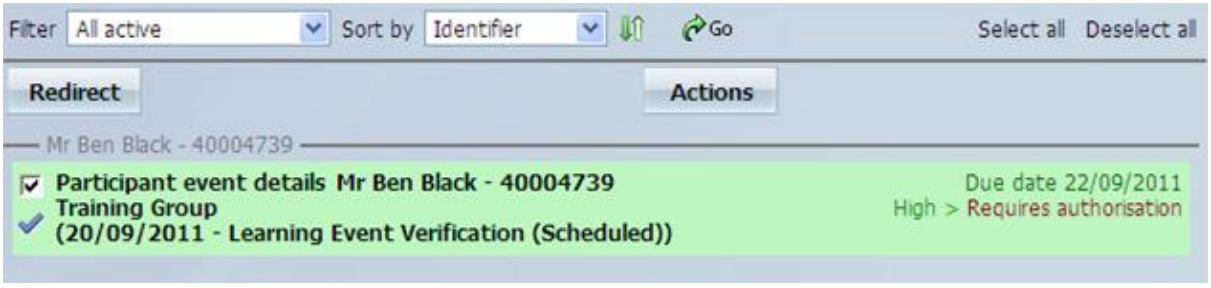
Clicking on the link within the email will bring up the log – in screen

Enter your University **User name and Password.** (This is your University network password)

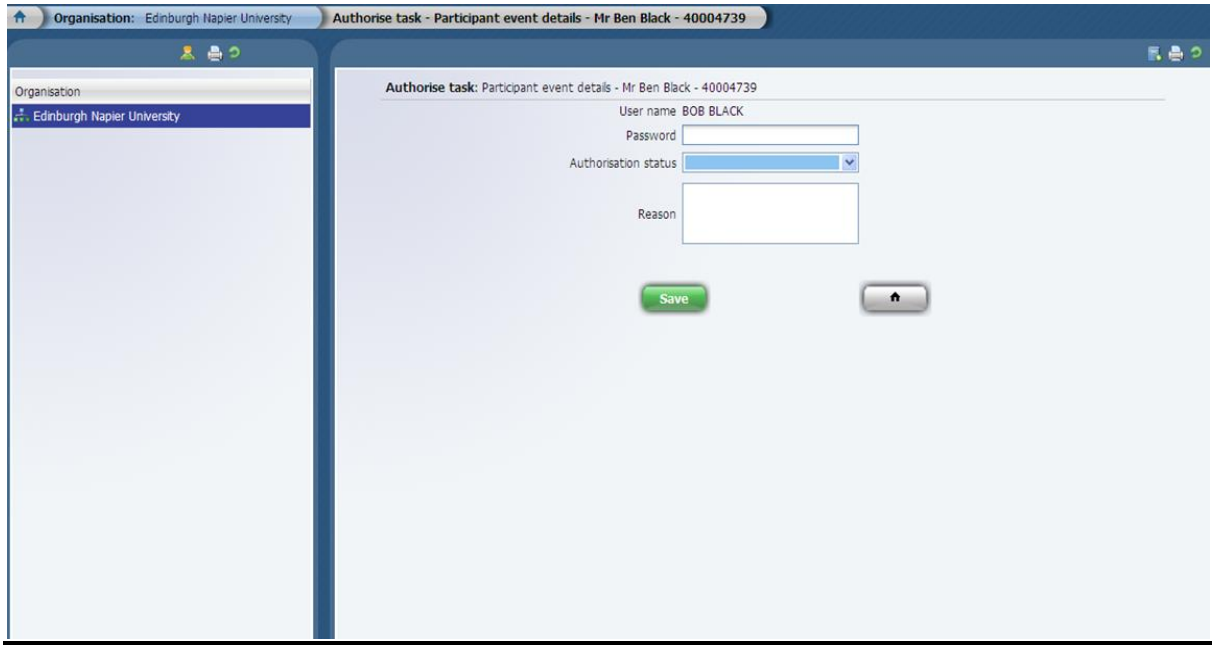
Once this is entered it will bring you directly to the Task List



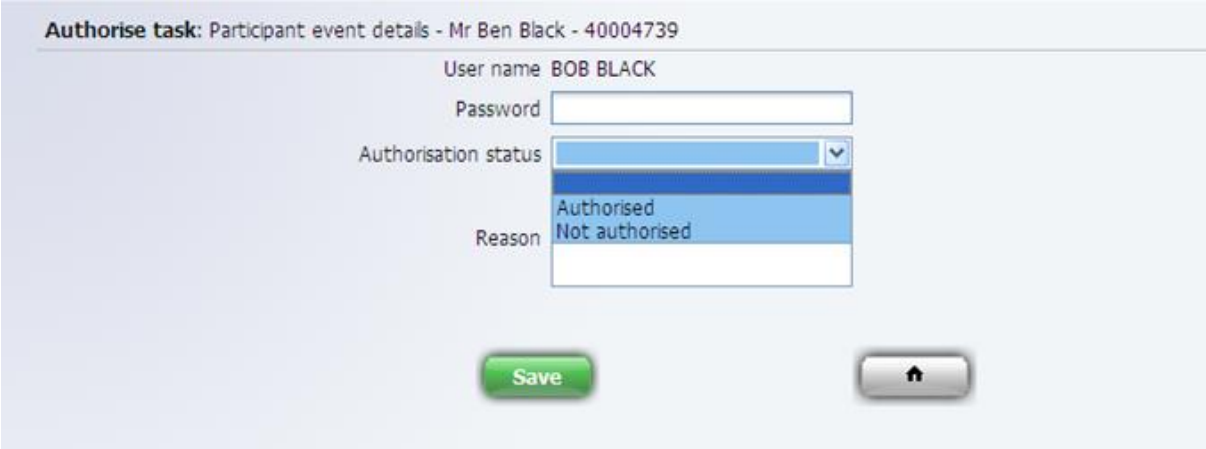
Click on the **Tick** box



Click **Actions** and you will be brought to the Authorise tasks screen


Organisation: Edinburgh Napier University
Authorise task - Participant event details - Mr Ben Black - 40004739
Organisation
Edinburgh Napier University
Authorise task: Participant event details - Mr Ben Black - 40004739
User name BOB BLACK
Password
Authorisation status
Reason
Save

To authorise, enter your password
Select the correct Authorisation status from the drop down menu.

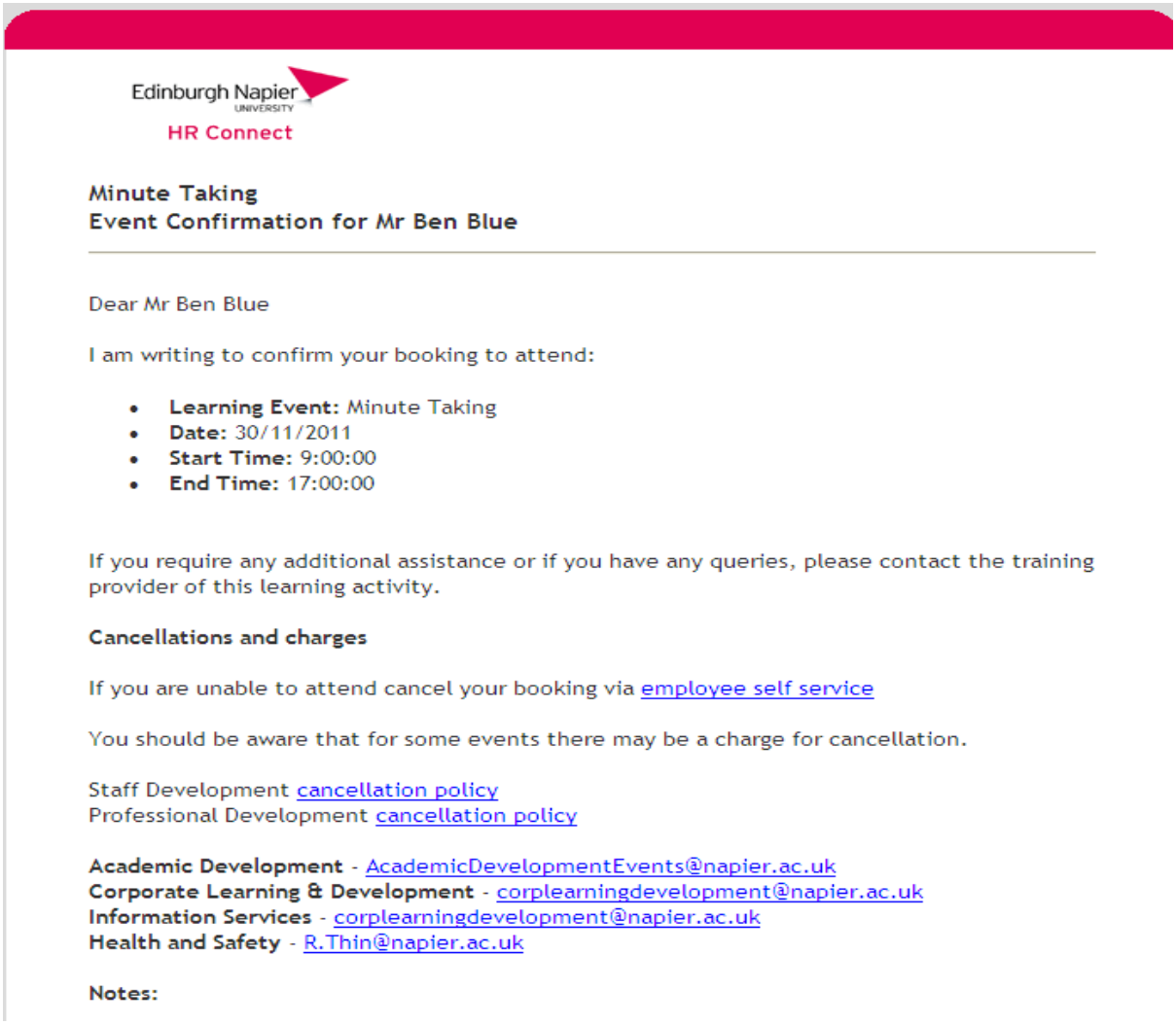


Add a reason or comment – this will be included in the notification email.
Click **Save**.

When you approve or reject a request, a notification email will automatically be sent to the member of staff who submitted the request to advise them of the decision.

Employee Scheduled event notifications

Scheduled event confirmation



Edinburgh Napier UNIVERSITY
HR Connect

Minute Taking
Event Confirmation for Mr Ben Blue

Dear Mr Ben Blue

I am writing to confirm your booking to attend:

- **Learning Event:** Minute Taking
- **Date:** 30/11/2011
- **Start Time:** 9:00:00
- **End Time:** 17:00:00

If you require any additional assistance or if you have any queries, please contact the training provider of this learning activity.

Cancellations and charges

If you are unable to attend cancel your booking via employee self service

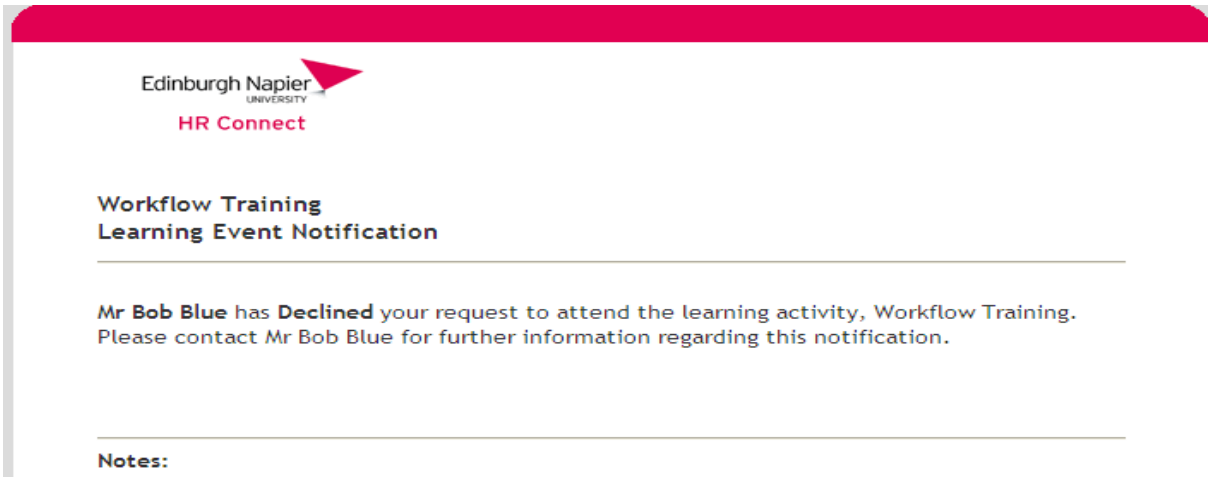
You should be aware that for some events there may be a charge for cancellation.

Staff Development cancellation policy
Professional Development cancellation policy

Academic Development - AcademicDevelopmentEvents@napier.ac.uk
Corporate Learning & Development - corplearningdevelopment@napier.ac.uk
Information Services - corplearningdevelopment@napier.ac.uk
Health and Safety - R.Thin@napier.ac.uk

Notes:

Scheduled event declined



Edinburgh Napier UNIVERSITY
HR Connect

Workflow Training
Learning Event Notification

Mr Bob Blue has **Declined** your request to attend the learning activity, Workflow Training.
Please contact Mr Bob Blue for further information regarding this notification.

Notes:

Cancellations

If your employee cancels their place on the event, you will receive an email notification.

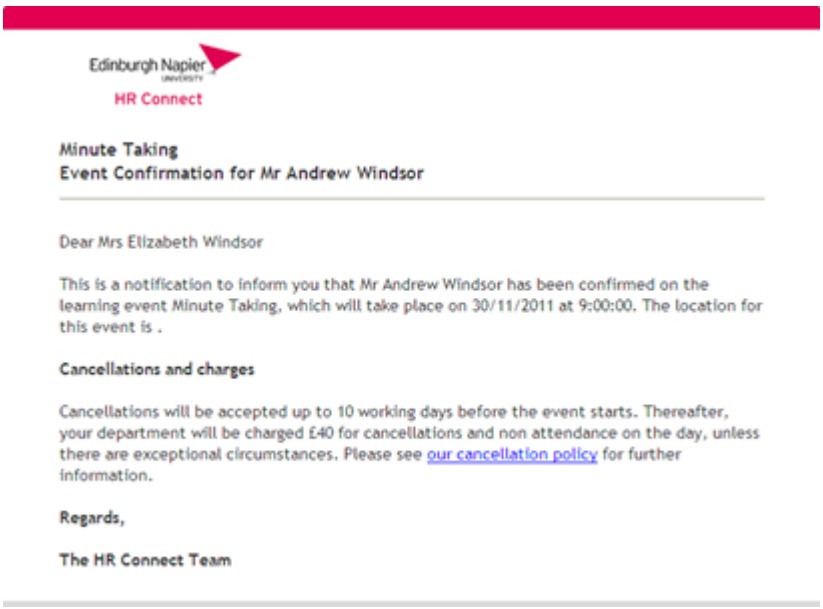
Edinburgh Napier UNIVERSITY
HR Connect

Event Cancellation

One of your reportees Mr Andrew Windsor has **cancelled** from the learning event Project 2007 - Intermediate on 22/09/2011 for the reason Weather conditions

Regards, The HR Connect Team

An Event Confirmation email will be sent two weeks before the event.


Edinburgh Napier UNIVERSITY
HR Connect

Minute Taking
Event Confirmation for Mr Andrew Windsor

Dear Mrs Elizabeth Windsor

This is a notification to inform you that Mr Andrew Windsor has been confirmed on the learning event Minute Taking, which will take place on 30/11/2011 at 9:00:00. The location for this event is .

Cancellations and charges

Cancellations will be accepted up to 10 working days before the event starts. Thereafter, your department will be charged £40 for cancellations and non attendance on the day, unless there are exceptional circumstances. Please see our cancellation policy for further information.

Regards,

The HR Connect Team

Following the event, the employee will receive a post course evaluation email asking them to complete this on line.